Education & Skills
Funding Agency

The adult skills funding calculation rulebase for 2019 to 2020

Version 1: October 2019

Contents

Introduction and purpose of the document

1.	This document is an annotated version of the adult skills funding calculation for the 2019 to 2020 funding year. The adult skills funding calculation includes training:

- delivered through the Adult Education Budget
- for apprenticeship frameworks that started before 1 May 2017
- delivered under an Advanced Learner Loan

2.	This document is aimed at software suppliers and people developing internal software.

Understanding our terminology

3.	The term 'we' refers to the Education and Skills Funding Agency. When we refer to 'you' or 'providers', this includes colleges, Higher Education Institutions, training organisations, local authorities and employers that receive funding from us to deliver education and training.

Changes from the 2018 to 2019 calculation

4.	We have developed new funding line types for devolved delivery.

Introduction to rulebases

Background

5.   We implement the funding calculation as a 'rulebase' using a rules management product called Oracle Policy Automation (OPA), which uses a natural-language approach to turn statements into computer logic.

6.   We compile this document into the product to produce the calculations; there is no separate set of programming code to implement the logic.

7.   The next section briefly explains about the rulebase, and how we construct it and view it. The formatting in the rulebase is important as some types of formatting represent a certain function or logic. We explain this fully in the next section.

What is a rule?

8.   A **rule** is an assertion that you can draw a conclusion from a set of criteria. For example:

- If you leave the ice cream in the sun, then the ice cream will melt.
- Full-time students and pensioners are eligible for a discount at the university bookshop.
- Your plane can take-off from the airport if it has permission from the control tower and has completed a safety check.

9.   Rules operate on data and can incorporate operations such as comparisons and mathematical functions.

What is a rulebase?

10.   A **rulebase** is simply a collection of one or more connected rules. For example:

- Rule 1:
    - the person is eligible for a discount at the university bookshop if
    - the person is a full-time student or
    - the person is a pensioner

- Rule 2:
    - the person is a full-time student if
    - the person is studying a full-time course and
    - the person does not have a full-time job

Conclusions and conditions

11.   Each rule must have a **conclusion** (the set of criteria that can be determined) and usually has at least one **condition** (the conditions upon which that determination may be made). A conclusion is the "Then" part of an "If... Then..." statement. A condition is the "If" part of an "If.... Then..." statement.

12.   Here are some examples, each with a conclusion and one or two conditions:

Example 1:
- CONCLUSION: the ice-cream will melt **if**
  - o   CONDITION: the ice-cream has been left in the sun

Example 2:
- CONCLUSION: the person is eligible for discount at the university bookshop **if**
  - o   CONDITION: the person is a full-time student
  - o   CONDITION: the person is a pensioner

Example 3:
- CONCLUSION: your plane can take-off from the airport **if**
  - o   CONDITION: it has permission from the control tower
  - o   CONDITION: it has completed a safety check

What is an attribute?

13.   An attribute is a single unit of data or fact. For example:

- the person is a full-time student
- the ice-cream has been left in the sun

14.   An attribute is a certain data type; either boolean, or variable (text, number, currency, date, time of day, or date and time). Attributes form the building blocks of rules.

- Boolean attributes can either have a true or false value
- Variable attributes take a text, number, currency, date, time of day, or date and time value depending on the type of variable.

15.   The following are some examples of attributes and types:

- the person is hungry (boolean attribute)
- the person's name (variable attribute – text)
- the person's date of birth (variable attribute – date)
- the number of cookies the person wants to eat (variable attribute – number)
- the cost of the person's meal (variable attribute – currency)

Connecting conditions using and/or

16.   Where a rule contains multiple conditions, the conditions must be separated by an **and** or an **or** to indicate whether one or all conditions are required to satisfy the conclusion.

17.   Using the details in the table below:

- In Example 1, both conditions must be true to be able to draw a positive outcome for the person's eligibility. If either condition is false, then you can only draw a negative outcome.
- In Example 2, either the first or second condition, or both, must be true to be able to draw a positive outcome. If both the conditions are false, then a negative outcome is drawn.

Example 1	Example 2
the person is eligible for a pension if:	the person is eligible for a pension if:
the person is over 65.	the person is over 65.
AND	OR
the person is a citizen.	the person is unable to work.

Grouping conditions using both/all and either/any

18.   We use the **all** operator to group conditions separated by **and**.

19.   In the example below, "A if B or (C and D)" the brackets are around the conditions joined by an **and** so you must use the **all** operator in your rule:

20.   We use the **any** operator to group conditions separated by **or**.

21.   In the example below, "A if (B or C) and D" the brackets are around the conditions joined by an **or** so you must use the **any** operator in your rule:

conclusion	**A is true if**	
level 1	any	
level 2		B is true
level 2		or
level 2		C is true
level 1	and	
level 1	D is true	

22.   You may also use the word **both** in place of **all** and **either** in place of **any**. Using these words has the same effect but may make the text more readable where you group only two conditions.

23.   The grouping operators sit above the conditions they are grouping. The conditions grouped sit beneath the grouping operator and should therefore take the style of the next level down. For example, if the word "any" is in **Level 1** style, the conditions it is grouping should be in **Level 2** style. The following example demonstrates this placement:

conclusion	**the claimant is eligible for a pension if**	
level 1	the claimant is poor	
level 1	or	
level 1	all	
level 2		the claimant is sick and
level 2		the claimant has been sick for more than 6 months and
level 2		the claimant does not have another form of income

24.   Where your rule continues (as in the example below) at the higher level, the appropriate operator (**and** or **or**) should be added as a separate line at the same level as the subsequent condition. For example:

conclusion	**the claimant is eligible for a pension if**	
level 1	the claimant is poor or	
level 1	all	
level 2		the claimant is sick and
level 2		the claimant has been sick for more than 6 months and
level 2		the claimant does not have another form of income
level 1	or	
level 1	the claimant has been entitled to a pension previously	

Alternative conclusions

25.   By default, Oracle Policy Modelling assumes all rules contain an **alternative conclusion**. That is, if the conditions are not satisfied, you can infer the opposite of the conclusion.

26.   For example, given the rule:

- CONCLUSION: it is a good idea to take an umbrella **if**

- o CONDITION: it is raining outside

If it is not raining outside, you may conclude that it is not a good idea to take an umbrella. You do not need to state the alternative conclusion, it is assumed in all rules unless otherwise indicated.

Understand Oracle Policy Modelling format and structure

27.	Oracle Policy Modelling format is strict to maintain consistency and completeness of rules and to avoid logical ambiguity. Styles and indentation play an important role in recognizing the meaning of rules.

28.	Indentation and styles separate the conditions from the conclusion, and conditions of different levels from each other. Distinct conditions are separated onto different lines, and the placement of **and** and **or** between conditions has special significance.

29.	Rules are marked up in Word using Oracle Policy Modelling styles. Each style has a unique style name and colouring to make it easy to identify.

30.	The rule below shows an example of how you format a rule in Word using Oracle Policy Modelling document styles:

conclusion	**the claimant is eligible for living allowances if**
level 1	the claimant is living alone and
level 1	the claimant satisfies the age criteria
level 2	the claimant satisfies the male age criteria
level 3	the claimant is aged over 65 and
level 3	the claimant is a man
level 2	or
level 2	the claimant satisfies the female age criteria
level 3	the claimant is aged over 63 and
level 3	the claimant is a woman

Rule tables in Word documents

31.	In many cases, it is more efficient to use rule tables for expressing logic, especially where there is an implied order of logic and/or you need to make sure you reach a conclusion. The following diagram shows how a rule table is structured:

attribute to be set (conclusion)	
value if	premise
value if	premise
...	...
value	otherwise

32.   The first row of the table defines which variable or statement you use as the conclusion attribute for the rule.

33.   The left-hand column is used to specify values (includes mathematical expressions) which will set the value of the conclusion attribute if the condition in the right-hand column of the same row equates to true.

34.   The final row provides an alternative conclusion, to which the conclusion will be set if all of the conditions equate to false. Using an example below, the table means 'If A is true then B is set to C, otherwise if D is true then B is set to E, otherwise B is set to F':

B	
C	A
E	D
F	otherwise

35.   Rule tables operate from top to bottom, with an implicit 'otherwise' between each row. The conclusion is set based on the first condition that is proved to be true and the rule exited at that point (without assessing any of the conditions in the rows below). Therefore, the order of the rows in rule tables is important.

Uncertain vs Unknown

36.   We use 'uncertain' as well as 'unknown' in rule bases and it is important to understand the difference between the two.

- An attribute is unknown if it has simply not been provided (or in the context of an interview, the question has not yet been asked).
- An attribute is uncertain if some or all of the information necessary to prove a conclusion has been provided but the conclusion can still not be determined to be either true or false.

37.   The truth tables below show how uncertainty works with **and** and **or** statements:

P	Q	P AND Q
TRUE	UNCERTAIN	UNCERTAIN
UNCERTAIN	TRUE	UNCERTAIN
FALSE	UNCERTAIN	FALSE
UNCERTAIN	FALSE	FALSE
UNCERTAIN	UNCERTAIN	UNCERTAIN

P	Q	P OR Q
TRUE	UNCERTAIN	TRUE

P	Q	P OR Q
UNCERTAIN	TRUE	TRUE
FALSE	UNCERTAIN	UNCERTAIN
UNCERTAIN	FALSE	UNCERTAIN
UNCERTAIN	UNCERTAIN	UNCERTAIN

Determining whether an attribute's value is certain or known

38.   The known and certain operators are used on rule conditions and cause the condition to evaluate a predictable way when the underlying attribute in the condition has a particular value:

- The **uncertain** operator causes the condition to return true only if its value is uncertain. A condition using the uncertain operator returns false if the underlying value is not uncertain.
- The **known** operator is commonly used in procedural rules that drive an investigation. For example, forcing attributes to be known in a particular order before determining a goal.
- The **currently known** operator is used to test whether an attribute is known, without causing it to be brought up in the question search and asked of the user, i.e. it will test the *current* state of the attribute. It is used a lot where the rule base runs off data (rather than an interactive interview) where the data may or may not be provided, and the fact that a piece of data has not been provided has meaning (e.g. if the 'eligibility for entitlement funding' is simply not returned in the ILR then we can infer that the learner is not eligible for entitlement).
- The **unknown** operator is most commonly used for defaulting values in the rulebase where the user has the option of providing an overriding value (either directly or through an inferred attribute).

39.   The table below shows how this works:

Operator	Example
certain	the claimant is eligible for the benefit if it is certain whether or not the claimant is entitled to a payment or the claimant's eligibility status is certain
uncertain	the outcome is unclear if it is uncertain whether or not the means have been achieved or the status of the investigation is uncertain

Operator	Example
known	the interview has been completed if it is known whether or not the claimant is eligible for a payment or the claimant's rate of benefit is known
unknown	the generic heading should be shown if it is unknown whether or not the person is eligible or the person's rate of entitlement in unknown
currently known	income details are available if the applicant's income is currently known

How are comments shown?

40.   Some explanatory comments are added within the rules. These are not part of the rules but may give background information or context. They are shown in the following format:

Comments are shown in this format.

They are usually shown above the rule or set of rules which the comment relates to.

41.   This is the end of the explanation for how we create rulebases. The following sections contain the details within the adult skills rulebase.

Parameters

42.   This section contains some parameters used by the calculation. They are grouped together in this section rather than 'hard-coding' values such as the current funding year start date, to make for easier maintenance of the rulebase in future.

the current funding year = "2019/2020"

the current funding year start date = 2019-08-01

the current funding year end date = 2020-07-31

the default job outcome percentage = 10%

the default total achievement percentage = 20%

the national non-government percentage = 50%

the ESOL method transition date = 2015-08-01

the Traineeship method transition date = 2015-08-01

the lookup factor transition date = 2016-08-01

the lookup factor campus transition date = 2019-08-01

the learning delivery's ESOL rate policy change date = 2016-08-01

The 2012/13 value is used for Functional Skills within Apprenticeships, which have an adjustment applied to give them the same effective rate as in 2012/13 for existing Frameworks.

the 2012/2013 Functional Skills fee proportion = 17.5%

the default area uplift = 1

the default disadvantage uplift = 1

the OLASS disadvantage uplift = 1.12

The large employer factor doesn't apply to Classroom learning, OLASS provision, or 16-18 Apprenticeships.

the default large employer factor = 1

the large employer factor for 19-24 Traineeships = 1

the large employer factor for 16-18 Apprenticeships = 1

the large employer factor for 19-23 Apprenticeships = 0.75

the large employer factor for 24+ Apprenticeships = 0.75

the large employer factor for Adult OLASS = 1

the large employer factor for AEB – Other Learning= 1

The next three factors are applied to the funding rates for apprenticeships in different age categories, and are based on the ratios between the 2012/13 National Rates.

the default Apprenticeship age factor = 1

This is the ratio of the 2012/13 National Rates between 16-18 Apprenticeships and 19-24 Apprenticeships.

the 16-18 Apprenticeship age factor = 1.0723

This is the ratio of the 2012/13 National Rates between 25+ Apprenticeships and 19-24 Apprenticeships.

the 24+ Apprenticeship age factor = 0.8

The cap is calculated from a learner's monthly instalments, excluding achievement. So to correspond to this, the main figure of £4,400 which represents the whole aim funding, has the default achievement percentage subtracted.

the yearly cap amount excluding achievement = £4,400 * (1 - the default total achievement percentage)

Categorisations

43.   This section includes categorisations. In many cases they are simple translations of ILR values into attributes to be used in other rules.

Apprenticeship Programmes

This section has a series of attributes derived from ILR values.

the learning delivery is an Apprenticeship if
the learning delivery's programme type is currently known and
any
> the learning delivery's programme type = 2 or
> the learning delivery's programme type = 3 or
> the learning delivery's programme type = 10 or
> the learning delivery's programme type = 20 or
> the learning delivery's programme type = 21 or
> the learning delivery's programme type = 22 or
> the learning delivery's programme type = 23

the learning delivery is an Apprenticeship programme aim if
the learning delivery is an Apprenticeship and
the learning delivery's aim type = 1

the learning delivery is an Apprenticeship component aim if
the learning delivery is an Apprenticeship and
the learning delivery's aim type = 3

the learning delivery is a Traineeship if
the learning delivery's programme type is currently known and
the learning delivery's programme type = 24

the learning delivery is a Traineeship programme aim if
the learning delivery is a Traineeship and
the learning delivery's aim type = 1

the learning delivery is a Traineeship component aim if

> the learning delivery is a Traineeship and
> the learning delivery's aim type = 3

Apprenticeship Knowledge and Competency component aims have their achievement payments held back until the programme aim achieves.

the learning delivery is an Apprenticeship Knowledge aim if

> the learning delivery is an Apprenticeship component aim and
> the learning delivery's framework component type is currently known and
> the learning delivery's framework component type = 2

Code 003 represents aims which are both Competency and Knowledge; categorised as Competency for this purpose.

the learning delivery is an Apprenticeship Competency aim if

> the learning delivery is an Apprenticeship component aim and
> the learning delivery's framework component type is currently known and
> any
>> the learning delivery's framework component type = 1 or
>> the learning delivery's framework component type = 3

the learning delivery is an Apprenticeship Knowledge or Competency aim if

> the learning delivery is an Apprenticeship Knowledge aim or
> the learning delivery is an Apprenticeship Competency aim

The assumption is that codes "004" and "005" will be used for Employer Rights and Responsibilities (ERR) and Personal Learning and Thinking Skills (PLTS), which are not funded within Apprenticeships, but could have non-zero matrix rates set for them outside Apprenticeships.

This logic was added to ensure they get zero funding within apprenticeships, as the original intention was to use matrix rates for some apprenticeship aims. As matrix rates are not now being used in apprenticeships, this step is now less essential but has been left in because it is still true that these types of aims should not be funded.

the learning delivery is a non-funded Apprenticeship aim if

the learning delivery is an Apprenticeship component aim and
the learning delivery's framework component type is currently known and
any

the learning delivery's framework component type = 4 or
the learning delivery's framework component type = 5

the learning delivery is an Apprenticeship Functional Skills aim if

the learning delivery is an Apprenticeship and
the learning delivery's framework common component is currently known and
any

the learning delivery's framework common component = 10 or
the learning delivery's framework common component = 11 or
the learning delivery's framework common component = 12

the learning delivery is a higher apprenticeship prescribed HE aim

the learning delivery is an Apprenticeship component aim and
the learning delivery's England prescribed id is currently known and
any

the learning delivery's England prescribed id = 1 or
the learning delivery's England prescribed id = 2

and
the learning delivery's programme type is currently known and
any

the learning delivery's programme type = 10 or
the learning delivery's programme type = 20 or
the learning delivery's programme type = 21 or
the learning delivery's programme type = 22 or
the learning delivery's programme type = 23

ESOL Learning Aim

the learning delivery's basic skills type code stage 1 = TemporalFromStartDate(the learning delivery's annual values, the learning delivery annual value's effective from date, the learning delivery annual value's basic skills type code)

the learning delivery's basic skills type code	
the learning delivery's basic skills type code stage 1	the learning delivery's basic skills type code stage 1 is currently known and
	the learning delivery's basic skills type code stage 1 is certain
0	otherwise

the learning delivery's applicable basic skills type code = ValueAt(the learning delivery's adjusted start date, the learning delivery's basic skills type code)

the learning delivery is an ESOL aim if

the learning delivery's basic skills type code is currently known and

the learning delivery's basic skills type code is certain and

any

the learning delivery's applicable basic skills type code = 36 or

the learning delivery's applicable basic skills type code = 37 or

the learning delivery's applicable basic skills type code = 38 or

the learning delivery's applicable basic skills type code = 39 or

the learning delivery's applicable basic skills type code = 40 or

the learning delivery's applicable basic skills type code = 41 or

the learning delivery's applicable basic skills type code = 42

Traineeship Work Placement Aims and Work Preparation Aims

the learning delivery is a Traineeship work preparation aim

For at least one of the learning delivery's LARS categories (the category)

the category's reference = 2 and

the category's effective from date is on or earlier than the learning delivery's adjusted start date and

either

the category's effective to date is currently unknown

or

all

the category's effective to date is currently known and

the category's effective to date is certain and

the category's effective to date is on or later than the learning delivery's adjusted start date

the learning delivery is a Traineeship work placement aim

For at least one of the learning delivery's LARS categories (the category)

the category's reference = 4 and

the category's effective from date is on or earlier than the learning delivery's adjusted start date and

either

the category's effective to date is currently unknown

or

all

the category's effective to date is currently known and

the category's effective to date is certain and

the category's effective to date is on or later than the learning delivery's adjusted start date

Large Employer

the learner employment status large employer reference indicates large employment stage one if

the number of the learner employment status's large employer reference entities > 0 and

for at least one of the learner employment status's large employer reference data

TemporalOnOrAfter(the learner employment status large employer reference data's effective from date) and

either

all

the learner employment status large employer reference data's effective to date is currently known and

TemporalOnOrBefore(the learner employment status large employer reference data's effective to date)

or

the learner employment status large employer reference data's effective to date is currently unknown

the learning delivery's employer identifier is a large employer stage one if

for all of the Apprenticeship programme aim's latest applicable employment statuses

ValueAt(the learning delivery's applicable employment factor date, the learner employment status large employer reference indicates large employment stage one)

the learning delivery's employer identifier is a large employer if

it is currently known whether or not the learning delivery's employer identifier is a large employer stage one and

it is certain whether or not the learning delivery's employer identifier is a large employer stage one and

the learning delivery's employer identifier is a large employer stage one and

for at least one of the Apprenticeship programme aim's latest applicable employment statuses

the number of the learner employment status's large employer reference entities > 0 and

the employment status's employer identifier is currently known

the number of employment status's large employer reference data stage 1 = the number of the learner employment status's large employer reference data

the number of the learner employment status's large employer reference entities	
the number of employment status's large employer reference data stage 1	the number of employment status's large employer reference data stage 1 is currently known and the number of employment status's large employer reference data stage 1 is certain
0	otherwise

Funding and Monitoring Codes

the learning delivery is Workplace learning if

the learning delivery's WPL FAM code is currently known and
the learning delivery's WPL FAM code = 1

Any aim which is not Workplace learning and not an Apprenticeship is automatically classed as Classroom learning.

the learning delivery is Classroom learning if

the learning delivery is not Workplace learning and
the learning delivery is not an Apprenticeship

the learning delivery is OLASS in custody if

the learning delivery's number of FAM records > 0 and
either
    for at least one of the learning delivery's FAMs
        the learning delivery FAM's upper case type = "LDM" and
        either
            the learning delivery FAM's code = "34" or
            the learning delivery FAM's code = "034"

Residential aims get a long term residential college uplift if the provider is also an LTRC provider.

the learning delivery is residential if

the learning delivery's number of FAM records > 0 and

either

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "LDM" and

the learning delivery FAM's code = "322"

the learning delivery is funded from a procured budget if

the learning delivery's number of FAM records > 0 and

either

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "LDM" and

the learning delivery FAM's code = "357"

or

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "DAM" and

the learning delivery FAM's numeric code = 2

Achievement does not have funding adjustment for prior learning applied if the learning delivery is a restart.

the learning delivery is a restart if

the learning delivery's number of FAM records > 0 and

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "RES" and

the learning delivery FAM's numeric code = 1

Eligibility for Enhanced Apprenticeship Funding.

the learning delivery FAM's numeric code = Number(the learning delivery FAM's code)

the learning delivery is EEF 2 if

the learning delivery's number of FAM records > 0 and

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "EEF" and

the learning delivery FAM's numeric code = 2

the learning delivery is EEF 3 if

the learning delivery's number of FAM records > 0 and

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "EEF" and

the learning delivery FAM's numeric code = 3

the learning delivery is EEF 4 if

the learning delivery's number of FAM records > 0 and

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "EEF" and

the learning delivery FAM's numeric code = 4

Determine whether the aim is fully funded or co-funded.

the learning delivery is fully funded if

the learning delivery's number of FAM records > 0 and

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "FFI" and

the learning delivery FAM's numeric code = 1

The large employer factor is not applied to ATA or GTA Apprenticeship aims.

the learning delivery is an ATA or GTA Apprenticeship aim if

the learning delivery is an Apprenticeship and

the learning delivery's number of FAM records > 0 and

for at least one of the learning delivery's FAMs

the learning delivery FAM's upper case type = "LDM" and

either

the learning delivery FAM's code = "129" or

the learning delivery FAM's code = "130"

Area and Disadvantage Uplifts

The area cost factor and disadvantage uplift default to 1 if they are unknown.

the learning delivery postcode area cost reference data's effective to date stage one	
the date 1 day after the learning delivery postcode area cost reference data's effective to date	the learning delivery postcode area cost reference data's effective to date is currently known and the learning delivery postcode area cost reference data's effective to date is certain
2099-01-01	otherwise

the learning delivery's area cost factor stage one = TemporalFromRange(the learning delivery's postcode area cost reference data, the learning delivery postcode area cost reference data's effective from date, the learning delivery postcode area cost reference data's effective to date stage one, the learning delivery postcode area cost reference data's area cost factor)

the learning delivery's area cost factor = ValueAt(the learning delivery's applicable lookup factor date, the learning delivery's area cost factor stage one)

the learning delivery's adjusted area cost factor	
the default area uplift	the learning delivery's area cost factor is uncertain or the learning delivery's area cost factor is unknown
the learning delivery's area cost factor	the learning delivery's area cost factor is currently known and the learning delivery's area cost factor > 1
the default area uplift	otherwise

the learner postcode disadvantage uplift reference data's effective to date stage one	
the date 1 day after the learner postcode disadvantage uplift reference data's effective to date	the learner postcode disadvantage uplift reference data's effective to date is currently known and the learner postcode disadvantage uplift reference data's effective to date is certain
2099-01-01	otherwise

the learner's disadvantage uplift = TemporalFromRange(the learner's postcode disadvantage uplift reference data, the learner postcode disadvantage uplift reference data's effective from, the learner postcode disadvantage uplift reference data's effective to date stage one, the learner postcode disadvantage uplift reference data's Uplift)

the learning delivery's disadvantage uplift = ValueAt(the learning delivery's applicable lookup factor date, the learner's disadvantage uplift)

the learning delivery's adjusted disadvantage uplift	
the OLASS disadvantage uplift	the learning delivery is OLASS in custody
the default disadvantage uplift	the learning delivery's disadvantage uplift is uncertain or the learning delivery's disadvantage uplift is unknown
the learning delivery's disadvantage uplift	the learning delivery's disadvantage uplift is currently known and the learning delivery's disadvantage uplift > 1
the default disadvantage uplift	otherwise

Devolved Funding

the learning delivery's funding organisation code	

"ESFA"	the learning delivery's number of FAM records > 0 and
	for at least one of the learning delivery's FAMs
	  the learning delivery FAM's upper case type = "SOF" and
	  the learning delivery FAM's code = "105"

"GMCA"	the learning delivery's number of FAM records > 0 and
	for at least one of the learning delivery's FAMs
	  the learning delivery FAM's upper case type = "SOF" and
	  the learning delivery FAM's code = "110"

"LCRCA"	the learning delivery's number of FAM records > 0 and
	for at least one of the learning delivery's FAMs
	  the learning delivery FAM's upper case type = "SOF" and
	  the learning delivery FAM's code = "111"

"WMCA"	the learning delivery's number of FAM records > 0 and
	for at least one of the learning delivery's FAMs
	  the learning delivery FAM's upper case type = "SOF" and
	  the learning delivery FAM's code = "112"

"WECA"	the learning delivery's number of FAM records > 0 and
	for at least one of the learning delivery's FAMs
	  the learning delivery FAM's upper case type = "SOF" and
	  the learning delivery FAM's code = "113"

"TVCA"	the learning delivery's number of FAM records > 0 and
	for at least one of the learning delivery's FAMs
	  the learning delivery FAM's upper case type = "SOF" and
	  the learning delivery FAM's code = "114"

"CPCA"	the learning delivery's number of FAM records > 0 and
	for at least one of the learning delivery's FAMs
	  the learning delivery FAM's upper case type = "SOF" and
	  the learning delivery FAM's code = "115"

"London"	the learning delivery's number of FAM records > 0 and for at least one of the learning delivery's FAMs the learning delivery FAM's upper case type = "SOF" and

	the learning delivery FAM's code = "116"
"None"	otherwise

Funding Line Type

The funding line type is used to aggregate the funding into various different categories based on the learner's age, whether they are an Offender in Custody, Traineeship, Classroom Learning, Workplace Learning etc.

Note that if the learner was aged 24 when they started an Apprenticeship, and they started before 1 August 2013, the learner is classed as a 19-23 Apprenticeship. This is to maintain the principle of paying using the rate at start; otherwise the rates would be scaled by 80% with the change in categorisation from '19-24' (in 2012/13) to '19-23'.

the learning delivery's funding line type	
"19-24 Traineeship (non-procured)"	the learner's age at 31st August of the current funding year >= 19 and the learning delivery is not OLASS in custody and the learning delivery is a Traineeship and the learning delivery is not funded from a procured budget
"19-24 Traineeship (procured from Nov 2017)"	the learner's age at 31st August of the current funding year >= 19 and the learning delivery is not OLASS in custody and the learning delivery is a Traineeship and the learning delivery is funded from a procured budget
"ESFA AEB - Adult Skills (non-procured)"	the learning delivery's funding organisation code = "ESFA" and the learner's age at 31st August of the current funding year >= 19 and the learning delivery is not OLASS in custody and the learning delivery is not an Apprenticeship and the learning delivery is not funded from a procured budget
"ESFA AEB - Adult Skills (procured from Nov 2017)"	the learning delivery's funding organisation code = "ESFA" and the learner's age at 31st August of the current funding year >= 19 and

	the learning delivery is not OLASS in custody and
	the learning delivery is not an Apprenticeship and
	the learning delivery is funded from a procured budget
"Adult Education – Eligible for MCA/GLA funding (non-procured)"	the learning delivery's funding organisation code <> "ESFA" and
	the learning delivery's funding organisation code <> "None" and
	the learner's age at 31st August of the current funding year >= 19 and
	the learning delivery is not OLASS in custody and
	the learning delivery is not an Apprenticeship and
	the learning delivery is not funded from a procured budget
"Adult Education – Eligible for MCA/GLA funding (procured)"	the learning delivery's funding organisation code <> "ESFA" and
	the learning delivery's funding organisation code <> "None"
	the learner's age at 31st August of the current funding year >= 19 and
	the learning delivery is not OLASS in custody and
	the learning delivery is not an Apprenticeship and
	the learning delivery is funded from a procured budget
"Adult OLASS"	the learning delivery is OLASS in custody
"16-18 Apprenticeship"	the learning delivery's age at start < 19 and
	the learning delivery is an Apprenticeship
"16-18 Apprenticeship"	the learning delivery's age at start >= 19 and
	the learning delivery is EEF 2 and
	the learning delivery is an Apprenticeship
"19-23 Apprenticeship"	the learning delivery's age at start >= 19 and
	the learning delivery's age at start < 24 and
	the learning delivery is not EEF 2 and
	the learning delivery is an Apprenticeship
"19-23 Apprenticeship"	the learning delivery's age at start = 24 and
	the learning delivery is an Apprenticeship and
	the learning delivery's adjusted Apprenticeship programme start date is earlier than the funding method transition date
"19-23 Apprenticeship"	the learning delivery's age at start >= 24 and
	the learning delivery is EEF 3 and

	the learning delivery is an Apprenticeship
"24+ Apprenticeship"	the learning delivery's age at start >= 24 and the learning delivery is not EEF 3 and the learning delivery is an Apprenticeship
"None"	**otherwise**

Entity Counts

The Learner FAM entity count has to be done in two stages because if there are no Learner FAM records, OPA returns an unknown rather than a zero.

the learning delivery's number of FAM records stage 1 = the number of the learning delivery's FAMs

the learning delivery's number of FAM records	
the learning delivery's number of FAM records stage 1	the learning delivery's number of FAM records stage 1 is currently known
0	**otherwise**

the learning delivery's number of Apprenticeship pathway programme aim records = the number of the learning delivery's Apprenticeship pathway programme aims

Upper Case Conversions

The ILR data is case insensitive, but OPA is case sensitive, so the FAM type is upper-cased here so that, for example, "LSF" can be used in the rulebase without worrying about the case of the original ILR data.

the learning delivery's upper case unit type = ToUpper(the learning delivery's unit type)

the learning delivery FAM's upper case type = ToUpper(the learning delivery FAM's type)

the organisational funding's upper case funding factor = ToUpper(the organisational funding's funding factor)

the organisational funding's upper case funding factor type = ToUpper(the organisational funding's funding factor type)

Date Rules

44.   This section contains some derived date attributes and attributes which define the start and end of various periods or years.

Aim Start and End Dates

Use the original start date if it is known, otherwise use the start date.

the learning delivery's adjusted start date	
the learning delivery's original learning start date	the learning delivery's original learning start date is currently known
the learning delivery's learning start date	otherwise

the learning delivery's applicable campus lookup factor date	
the learning delivery's adjusted start date	the learning delivery's adjusted start date >= the lookup factor campus transition date
the lookup factor campus transition date	otherwise

the learning delivery's applicable lookup factor date	
the learning delivery's adjusted start date	the learning delivery's adjusted start date >= the lookup factor transition date
the date 1 day before the lookup factor transition date	otherwise

the learning delivery's applicable employment factor date	
the learning delivery's adjusted Apprenticeship programme start date	the learning delivery's adjusted Apprenticeship programme start date >= the lookup factor transition date
the date 1 day before the lookup factor transition date	otherwise

If an aim starts and finishes in the same period, it always generates funding in that period (assuming other funding eligibility criteria are met).

the learning delivery's planned end date and start date are in the same period if

ExtractMonth(the learning delivery's learning planned end date) = ExtractMonth(the learning delivery's learning start date) and

ExtractYear(the learning delivery's learning planned end date) = ExtractYear(the learning delivery's learning start date)

the learning delivery's actual end date and start date are in the same period if

ExtractMonth(the learning delivery's learning actual end date) = ExtractMonth(the learning delivery's learning start date) and

ExtractYear(the learning delivery's learning actual end date) = ExtractYear(the learning delivery's learning start date)

If the start date is 10 August 2013, this attribute would be set to 1 August 2013. This is used when setting the time-based cash outputs as they have to span a whole period.

the beginning of the learning delivery's start date period =
MakeDate(ExtractYear(the learning delivery's learning start date), ExtractMonth(the learning delivery's learning start date), 1)

If the actual end date is 10 August 2013, this attribute would be set to 1 August 2013. This is used when setting the time-based cash outputs as they have to span a whole period.

the beginning of the learning delivery's actual end date period =
MakeDate(ExtractYear(the learning delivery's learning actual end date), ExtractMonth(the learning delivery's learning actual end date), 1)

The next rules are used to determine the last period where funding is to be generated. For funding to be generated in a period, the planned or actual end date has to reach the end of that period. For example:

Planned end date = 10 August 2013. Below attribute = 1 August 2013.

Planned end date = 30 August 2013. Below attribute = 1 August 2013.

Planned end date = 31 August 2013. Below attribute = 1 September 2013.

the beginning of the period the day after the learning delivery's planned end date =
MakeDate(ExtractYear(the date 1 days after the learning delivery's learning planned end date), ExtractMonth(the date 1 days after the learning delivery's learning planned end date), 1)

the beginning of the period the day after the learning delivery's actual end date =
MakeDate(ExtractYear(the date 1 days after the learning delivery's learning actual end date), ExtractMonth(the date 1 days after the learning delivery's learning actual end date), 1)

This is a time-based attribute which is set to True for every day in the period of the aim's actual end date. This is used when assigning the balancing and job outcome payments.

the date is in the learning delivery's actual end date period	
true	the learning delivery's learning actual end date is currently known and TemporalOnOrAfter(the beginning of the learning delivery's actual end date period) and TemporalBefore(the date 1 months after the beginning of the learning delivery's actual end date period) and the date is in the current funding year
false	otherwise

This is the start date of the earliest Apprenticeship programme aim with the same framework code and pathway code as the Apprenticeship component aim.

the learning delivery's Apprenticeship programme start date	
the earliest of all the learning delivery's learning start date for the learning delivery's Apprenticeship programme aims	the learning delivery is an Apprenticeship programme aim or the learning delivery is an Apprenticeship component aim
uncertain	otherwise

This is similar to the above except that it uses the original start date if it is known.

the learning delivery's adjusted Apprenticeship programme start date	
the earliest of all the learning delivery's adjusted start date for the learning delivery's Apprenticeship programme aims	the learning delivery is an Apprenticeship programme aim or the learning delivery is an Apprenticeship component aim
uncertain	**otherwise**

the learning delivery's adjusted Traineeship programme start date	
the earliest of all the learning delivery's adjusted start date for the learning delivery's Traineeship programme aims	the learning delivery is a Traineeship programme aim or the learning delivery is a Traineeship component aim
uncertain	**otherwise**

Funding and Monitoring From and To Dates

If the Learning Delivery FAM's 'from' date is 10 August 2013, this attribute would be set to 1 August 2013. This is used when setting the time-based cash outputs as they have to span a whole period.

the beginning of the learning delivery FAM's from date period = MakeDate(ExtractYear(the learning delivery FAM's date applies from), ExtractMonth(the learning delivery FAM's date applies from), 1)

This is a way of determining the last period in which Learning Support Funding is to be generated, because for funding to be generated in a period, the Learning Delivery FAM's 'to' date has to reach the end of that period.

the beginning of the period the day after the learning delivery FAM's to date = MakeDate(ExtractYear(the date 1 days after the learning delivery FAM's date applies to), ExtractMonth(the date 1 days after the learning delivery FAM's date applies to), 1)

Planned, Actual and Threshold Days

This is the number of days between the start date and the planned end date.

the learning delivery's planned number of days in learning = 1 + DayDifference(the learning delivery's learning start date, the learning delivery's learning planned end date)

This is the number of days between the start date and the actual end date.

the learning delivery's actual number of days in learning	
1 + DayDifference(the learning delivery's learning start date, the learning delivery's learning actual end date)	the learning delivery's learning actual end date is currently known
0	**otherwise**

This is the number of days which the aim has to be in learning for in order to be considered for funding (unless the aim is achieved).

the learning delivery's threshold days	
1	the learning delivery's planned number of days in learning >= 0 and the learning delivery's planned number of days in learning < 14
14	the learning delivery's planned number of days in learning >= 14 and the learning delivery's planned number of days in learning < 168
42	the learning delivery's planned number of days in learning >= 168
uncertain	**otherwise**

Age

This is the learner's age at the start of the aim. If the aim is an Apprenticeship component aim, it calculates the age at the start of the related Apprenticeship programme aim.

Note that this indirectly uses the new Original Start Date ILR field if completed.

the learning delivery's age at start	
uncertain	the learner's date of birth is unknown
the number of years between the learner's date of birth and the learning delivery's adjusted Apprenticeship programme start date	any the learning delivery is an Apprenticeship programme aim or the learning delivery is an Apprenticeship component aim and the learner's date of birth is on or earlier than the learning delivery's adjusted Apprenticeship programme start date
the number of years between the learner's date of birth and the learning delivery's adjusted start date	the learning delivery is not an Apprenticeship programme aim and the learning delivery is not an Apprenticeship component aim and the learner's date of birth is on or earlier than the learning delivery's adjusted start date
0	otherwise

This is the learner's age at the 31 August of the current funding year.

the learner's age at 31st August of the current funding year	
uncertain	the learner's date of birth is unknown
the number of years between the learner's date of birth and the 31st August of the current funding year	the learner's date of birth is on or earlier than the 31st August of the current funding year
0	otherwise

the 31st August of the current funding year = MakeDate(ExtractYear(the current funding year start date), 8, 31)

Global Date Rules

This is a time-based attribute which is set to True on the last day of every period. This is used when totalling up uncapped funding.

the date is the last day of the period if
> TemporalOncePerMonth(the current funding year start date, the date 1 days after the current funding year end date, 31)

This is a time-based attribute which is set to True on every day in the current funding year. This is used when setting the time-based cash outputs to ensure that funding is only generated in the current funding year.

the date is in the current funding year	
true	TemporalOnOrAfter(the current funding year start date) and TemporalOnOrBefore(the current funding year end date)
false	otherwise

LARS Funding Rate

the learning delivery's LARS funding effective to date stage 1	
the date 1 day after the learning delivery's LARS funding effective to date	the learning delivery's LARS funding effective to date is currently known and the learning delivery's LARS funding effective to date is certain
2099-01-01	otherwise

Adult_LR

the learning delivery's uppercase LARS funding category = ToUpper(the learning delivery's LARS funding category)

the learning delivery LARS funding is a member of the learning delivery's LARS Funding ADULT_LR funding categories if

the learning delivery LARS funding is a member of the learning delivery's LARS funding rates and

the learning delivery's uppercase LARS funding category is currently known and

the learning delivery's uppercase LARS funding category = "ADULT_LR"

the learning delivery's Adult LR weighted rate stage 1 = TemporalFromRange(the learning delivery's LARS Funding ADULT_LR funding categories, the learning delivery's LARS funding effective from date, the learning delivery's LARS funding effective to date stage 1,the learning delivery's LARS funding weighted rate)

the learning delivery's Adult LR weighted rate	
the learning delivery's Adult LR weighted rate stage 1	the learning delivery's Adult LR weighted rate stage 1 is currently known and the learning delivery's Adult LR weighted rate stage 1 is certain
0	otherwise

the learning delivery's Adult LR unweighted rate stage 1 =
TemporalFromRange(the learning delivery's LARS Funding ADULT_LR
funding categories, the learning delivery's LARS funding effective from date,
the learning delivery's LARS funding effective to date stage 1, the learning
delivery's LARS funding unweighted rate)

the learning delivery's Adult LR unweighted rate	
the learning delivery's Adult LR unweighted rate stage 1	the learning delivery's Adult LR unweighted rate stage 1 is currently known and the learning delivery's Adult LR unweighted rate stage 1 is certain
0	**otherwise**

the learning delivery's Adult LR programme weighting factor stage 1 =
TemporalFromRange(the learning delivery's LARS Funding ADULT_LR
funding categories, the learning delivery's LARS funding effective from date,
the learning delivery's LARS funding effective to date stage 1, the learning
delivery's LARS funding weighting factor)

the learning delivery's Adult LR programme weighting factor	
the learning delivery's Adult LR programme weighting factor stage 1	the learning delivery's Adult LR programme weighting factor stage 1 is currently known and the learning delivery's Adult LR programme weighting factor stage 1 is certain
"A"	**otherwise**

ER App

the learning delivery LARS funding is a member of the learning delivery's LARS
Funding ER App funding categories if

the learning delivery LARS funding is a member of the learning delivery's LARS funding rates and

the learning delivery's uppercase LARS funding category is currently known and

the learning delivery's uppercase LARS funding category = "APP_ACT_COST"

the learning delivery's ER App weighted rate stage 1 = TemporalFromRange(the learning delivery's LARS Funding ER App funding categories, the learning delivery's LARS funding effective from date, the learning delivery's LARS funding effective to date stage 1,the learning delivery's LARS funding weighted rate)

the learning delivery's ER App weighted rate	
the learning delivery's ER App weighted rate stage 1	the learning delivery's ER App weighted rate stage 1 is currently known and the learning delivery's ER App weighted rate stage 1 is certain
0	**otherwise**

the learning delivery's ER App programme weighting factor Stage 1 = TemporalFromRange(the learning delivery's LARS Funding ER App funding categories, the learning delivery's LARS funding effective from date, the date 1 day after the learning delivery's LARS funding effective to date stage 1, the learning delivery's LARS funding weighting factor)

the learning delivery's ER App programme weighting factor	
the learning delivery's ER App programme weighting factor Stage 1	the learning delivery's ER App programme weighting factor Stage 1 is currently known and the learning delivery's ER App programme weighting factor Stage 1 is certain
"A"	**otherwise**

ER Other

the learning delivery LARS funding is a member of the learning delivery's LARS Funding ER Other funding categories if

the learning delivery LARS funding is a member of the learning delivery's LARS funding rates and

the learning delivery's uppercase LARS funding category is currently known and

the learning delivery's uppercase LARS funding category = "ER_OTHER"

the learning delivery's ER Other weighted rate stage 1 = TemporalFromRange(the learning delivery's LARS Funding ER Other funding categories, the learning delivery's LARS funding effective from date, the learning delivery's LARS funding effective to date stage 1, the learning delivery's LARS funding weighted rate)

the learning delivery's ER Other weighted rate	
the learning delivery's ER Other weighted rate stage 1	the learning delivery's ER Other weighted rate stage 1 is currently known and the learning delivery's ER Other weighted rate stage 1 is certain
0	otherwise

the learning delivery's ER Other unweighted rate stage 1 = TemporalFromRange(the learning delivery's LARS Funding ER Other funding categories, the learning delivery's LARS funding effective from date, the learning delivery's LARS funding effective to date stage 1, the learning delivery's LARS funding unweighted rate)

the learning delivery's ER Other unweighted rate	
the learning delivery's ER Other unweighted rate stage 1	the learning delivery's ER Other unweighted rate stage 1 is currently known and the learning delivery's ER Other unweighted rate stage 1 is certain
0	otherwise

the learning delivery's ER Other programme weighting factor Stage 1 = TemporalFromRange(the learning delivery's LARS Funding ER Other funding categories, the learning delivery's LARS funding effective from date, the learning delivery's LARS funding effective to date stage 1, the learning delivery's LARS funding weighting factor)

the learning delivery's ER Other programme weighting factor	
the learning delivery's ER Other programme weighting factor Stage 1	the learning delivery's ER Other programme weighting factor Stage 1 is currently known and the learning delivery's ER Other programme weighting factor Stage 1 is certain
"A"	otherwise

Matrix

the learning delivery LARS funding is a member of the learning delivery's LARS Funding Matrix funding categories if

> the learning delivery LARS funding is a member of the learning delivery's LARS funding rates and
>
> the learning delivery's uppercase LARS funding category is currently known and
>
> the learning delivery's uppercase LARS funding category = "MATRIX"

the learning delivery's Matrix weighted rate stage 1 = TemporalFromRange(the learning delivery's LARS Funding Matrix funding categories, the learning delivery's LARS funding effective from date, the learning delivery's LARS funding effective to date stage 1, the learning delivery's LARS funding weighted rate)

the learning delivery's Matrix weighted rate	
the learning delivery's Matrix weighted rate stage 1	the learning delivery's Matrix weighted rate stage 1 is currently known and the learning delivery's Matrix weighted rate stage 1 is certain
0	**otherwise**

the learning delivery's Matrix unweighted rate stage 1 = TemporalFromRange(the learning delivery's LARS Funding Matrix funding categories, the learning delivery's LARS funding effective from date, the learning delivery's LARS funding effective to date stage 1, the learning delivery's LARS funding unweighted rate)

the learning delivery's Matrix unweighted rate	
the learning delivery's Matrix unweighted rate stage 1	the learning delivery's Matrix unweighted rate stage 1 is currently known and the learning delivery's Matrix unweighted rate stage 1 is certain
0	**otherwise**

the learning delivery's Matrix programme weighting factor stage 1 =
TemporalFromRange(the learning delivery's LARS Funding Matrix funding
categories, the learning delivery's LARS funding effective from date, the
learning delivery's LARS funding effective to date stage 1, the learning
delivery's LARS funding weighting factor)

the learning delivery's Matrix programme weighting factor	
the learning delivery's Matrix programme weighting factor stage 1	the learning delivery's Matrix programme weighting factor stage 1 is currently known and the learning delivery's Matrix programme weighting factor stage 1 is certain
"A"	otherwise

OLASS

the learning delivery LARS funding is a member of the learning delivery's LARS
Funding OLASS funding categories if

the learning delivery LARS funding is a member of the learning delivery's LARS
funding rates and

the learning delivery's uppercase LARS funding category is currently known and

the learning delivery's uppercase LARS funding category = "OLASS_ADULT"

the learning delivery's OLASS weighted rate stage 1 = TemporalFromRange(the
learning delivery's LARS Funding OLASS funding categories, the learning
delivery's LARS funding effective from date, the learning delivery's LARS
funding effective to date stage 1, the learning delivery's LARS funding
weighted rate)

the learning delivery's OLASS weighted rate	
the learning delivery's OLASS weighted rate stage 1	the learning delivery's OLASS weighted rate stage 1is currently known and the learning delivery's OLASS weighted rate stage 1 is certain
0	otherwise

the learning delivery's OLASS unweighted rate stage 1 = TemporalFromRange(the
learning delivery's LARS Funding OLASS funding categories, the learning
delivery's LARS funding effective from date, the learning delivery's LARS

funding effective to date stage 1, the learning delivery's LARS funding unweighted rate)

the learning delivery's OLASS unweighted rate	
the learning delivery's OLASS unweighted rate stage 1	the learning delivery's OLASS unweighted rate stage 1 is currently known and the learning delivery's OLASS unweighted rate stage 1 is certain
0	**otherwise**

the learning delivery's OLASS programme weighting factor Stage 1 = TemporalFromRange(the learning delivery's LARS Funding OLASS funding categories, the learning delivery's LARS funding effective from date, the learning delivery's LARS funding effective to date stage 1, the learning delivery's LARS funding weighting factor)

the learning delivery's OLASS programme weighting factor	
the learning delivery's OLASS programme weighting factor Stage 1	the learning delivery's OLASS programme weighting factor Stage 1 is currently known and the learning delivery's OLASS programme weighting factor Stage 1 is certain
"A"	**otherwise**

Funding Rate

45.   This section derives the funding rate for each aim, using values from the Learning Aim Reference Service (LARS).

Determine date used to select the Rate

This date field is used to pick the rate and programme weighting from LARS. The rate used will be the rate as at this date in LARS.

Aims which start before the funding method transition date (1 August 2013) use the LARS rate which is effective on 31 July 2013. Other aims use the LARS rate which is effective on the aim's start date, or the aim's original start date if it is known.

the learning delivery's applicable rate date	
the date 1 days before the funding method transition date	the learning delivery's adjusted start date is earlier than the funding method transition date
the learning delivery's adjusted start date	otherwise

Unweighted Rates

Aims which start or on after the funding method transition date (1 August 2013) use the LARS Matrix (ASB) rate.

Other aims use the LARS rate based on their old funding model, Employer Responsive Other, Adult Learner Responsive, or OLASS.

The unweighted rate is used for calculating the funding cap (not applied to Apprenticeships) and for calculating the Government contribution for non-Apprenticeship aims. Because neither of these is relevant to Apprenticeships, a zero rate is used.

Traineeship programme aims are not funded, so a zero rate is used for those too.

the learning delivery's applicable unweighted rate from LARS stage 1	
0	the learning delivery is an Apprenticeship or
	the learning delivery is a Traineeship programme aim
ValueAt(the learning delivery's applicable rate date, the learning delivery's Matrix unweighted rate)	the learning delivery's adjusted start date is on or later than the funding method transition date
ValueAt(the learning delivery's applicable rate date, the learning delivery's Adult LR unweighted rate)	the learning delivery was Adult Learner Responsive
ValueAt(the learning delivery's applicable rate date, the learning delivery's ER Other unweighted rate)	the learning delivery was Employer Responsive Other
ValueAt(the learning delivery's applicable rate date, the learning delivery's OLASS unweighted rate)	the learning delivery is OLASS in custody
0	**otherwise**

This converts an unknown or uncertain rate in LARS into a zero.

the learning delivery's applicable unweighted rate from LARS	
the learning delivery's applicable unweighted rate from LARS stage 1	the learning delivery's applicable unweighted rate from LARS stage 1 is currently known and
	the learning delivery's applicable unweighted rate from LARS stage 1 is certain
0	**otherwise**

Weighted Rates

Similar logic to the previous section; this time with the Weighted rates.

Aims which start or on after the funding method transition date (1 August 2013), which are not in Apprenticeships, use the new LARS Matrix (ASB) rate.

Other aims use the LARS rate based on their old funding model, Employer Responsive Other, Adult Learner Responsive, or OLASS.

For Apprenticeship and Traineeship programme aims, it uses a zero rate, because programme aims are not funded.

For Apprenticeship component aims, it uses the new LARS Matrix (ASB) rate.

the learning delivery's applicable weighted rate from LARS stage 1	
0	the learning delivery is an Apprenticeship programme aim or the learning delivery is a Traineeship programme aim
ValueAt(the learning delivery's applicable rate date, the learning delivery's ER App weighted rate)	the learning delivery is an Apprenticeship component aim
ValueAt(the learning delivery's applicable rate date, the learning delivery's Matrix weighted rate)	the learning delivery's adjusted start date is on or later than the funding method transition date
ValueAt(the learning delivery's applicable rate date, the learning delivery's Adult LR weighted rate)	the learning delivery was Adult Learner Responsive
ValueAt(the learning delivery's applicable rate date, the learning delivery's ER Other weighted rate)	the learning delivery was Employer Responsive Other
ValueAt(the learning delivery's applicable rate date, the learning delivery's OLASS weighted rate)	the learning delivery is OLASS in custody
0	**otherwise**

This converts an unknown or uncertain rate in LARS into a zero.

the learning delivery's applicable weighted rate from LARS	
the learning delivery's applicable weighted rate from LARS stage 1	the learning delivery's applicable weighted rate from LARS stage 1 is currently known and the learning delivery's applicable weighted rate from LARS stage 1 is certain
0	otherwise

the learning delivery's applicable unweighted rate from ESOL Hours = the learning delivery's applicable weighted rate from ESOL Hours

the learning delivery's applicable unweighted rate	
the learning delivery's applicable unweighted rate from ESOL Hours + the learning delivery's applicable unweighted rate from LARS	the learning delivery is an ESOL aim
0	the learning delivery is a Traineeship programme aim and the learning delivery's adjusted Traineeship programme start date is earlier than the Traineeship method transition date
970	the learning delivery is a Traineeship programme aim and the learning delivery's adjusted Traineeship programme start date is on or later than the Traineeship method transition date

0	the learning delivery is a Traineeship component aim and
	the learning delivery's adjusted Traineeship programme start date is on or later than the Traineeship method transition date
	any
	the learning delivery is a Traineeship work preparation aim or
	the learning delivery is a Traineeship work placement aim
the learning delivery's applicable unweighted rate from LARS	otherwise

the learning delivery's applicable weighted rate from ESOL Hours stage 1	
14	the learning delivery's additional ESOL hours > 0
	and
	the learning delivery's additional ESOL hours <= 2
	and
	the learning delivery's applicable lookup factor date >= the learning delivery's ESOL rate policy change date
21	the learning delivery's additional ESOL hours > 2
	and
	the learning delivery's additional ESOL hours <= 4
	and
	the learning delivery's applicable lookup factor date >= the learning delivery's ESOL rate policy change date
35	the learning delivery's additional ESOL hours > 4
	and
	the learning delivery's additional ESOL hours <= 6
	and
	the learning delivery's applicable lookup factor date >= the learning delivery's ESOL rate policy change date

50	the learning delivery's additional ESOL hours > 6 and the learning delivery's additional ESOL hours <= 12 and the learning delivery's applicable lookup factor date >= the learning delivery's ESOL rate policy change date
50	the learning delivery's additional ESOL hours > 0 and the learning delivery's additional ESOL hours <= 12 and the learning delivery's applicable lookup factor date < the learning delivery's ESOL rate policy change date
100	the learning delivery's additional ESOL hours > 12 and the learning delivery's additional ESOL hours <= 20
150	the learning delivery's additional ESOL hours > 20 and the learning delivery's additional ESOL hours <= 44
300	the learning delivery's additional ESOL hours > 44 And the learning delivery's additional ESOL hours <= 68
450	the learning delivery's additional ESOL hours > 68 and the learning delivery's additional ESOL hours <= 92
600	the learning delivery's additional ESOL hours > 92 and the learning delivery's additional ESOL hours <= 100
724	the learning delivery's additional ESOL hours > 100 and the learning delivery's additional ESOL hours <= 196
1265	the learning delivery's additional ESOL hours > 196 and the learning delivery's additional ESOL hours <= 292

1987	the learning delivery's additional ESOL hours > 292 and the learning delivery's additional ESOL hours <= 388
2573	the learning delivery's additional ESOL hours > 388 and the learning delivery's additional ESOL hours <= 580
4170	the learning delivery's additional ESOL hours > 580 and the learning delivery's additional ESOL hours <= 1060
6602	the learning delivery's additional ESOL hours >= 1061
0	**otherwise**

the learning delivery's applicable weighted rate from ESOL Hours	
0	the learning delivery is not a start for funding purposes or the learning delivery's learning start date is earlier than the ESOL method transition date or the learning delivery is not an ESOL aim or the learning delivery's additional ESOL hours is unknown or the learning delivery's additional ESOL hours is uncertain
the learning delivery's applicable weighted rate from ESOL Hours stage 1	**otherwise**

the learning delivery's applicable weighted rate	
the learning delivery's applicable weighted rate from ESOL Hours + the learning delivery's applicable weighted rate from LARS	the learning delivery is an ESOL aim
0	the learning delivery is a Traineeship programme aim and the learning delivery's adjusted Traineeship programme start date is earlier than the Traineeship method transition date
970	the learning delivery is a Traineeship programme aim and the learning delivery's adjusted Traineeship programme start date is on or later than the Traineeship method transition date
0	the learning delivery is a Traineeship component aim and the learning delivery's adjusted Traineeship programme start date is on or later than the Traineeship method transition date any the learning delivery is a Traineeship work preparation aim or the learning delivery is a Traineeship work placement aim
the learning delivery's applicable weighted rate from LARS	otherwise

Applicable Programme Weighting

Again, a similar set of logic to the previous two sections, this time to determine the programme weighting code.

This code is only used for providers with a Specialist Resources flag, which have a different funding rate applied for aims with programme weighting G.

Aims which start or on after the funding method transition date (1 August 2013), which are not in Apprenticeships, use the new LARS Matrix (ASB) programme weighting code.

Other aims use the LARS rate based on their old funding model, Employer Responsive Other or Adult Learner Responsive, or the OLASS LARS programme weighting code.

For Apprenticeship and Traineeship programme aims, it uses the default "A" programme weighting code, because the programme aims are not funded.

For Apprenticeship component aims, it uses the new LARS Matrix (ASB) programme weighting.

the learning delivery's applicable programme weighting factor stage 1	
"A"	the learning delivery is an Apprenticeship programme aim or the learning delivery is a Traineeship programme aim
ValueAt(the learning delivery's applicable rate date, the learning delivery's ER App programme weighting factor)	the learning delivery is an Apprenticeship component aim
ValueAt(the learning delivery's applicable rate date, the learning delivery's Matrix programme weighting factor)	the learning delivery's adjusted start date is on or later than the funding method transition date
ValueAt(the learning delivery's applicable rate date, the learning delivery's Adult LR programme weighting factor)	the learning delivery was Adult Learner Responsive
ValueAt(the learning delivery's applicable rate date, the learning delivery's ER Other programme weighting factor)	the learning delivery was Employer Responsive Other
ValueAt(the learning delivery's applicable rate date, the	the learning delivery is OLASS in custody

learning delivery's OLASS programme weighting factor)	
"A"	otherwise

This converts an unknown or uncertain programme weighting factor in LARS into the default "A".

the learning delivery's applicable programme weighting factor	
the learning delivery's applicable programme weighting factor stage 1	the learning delivery's applicable programme weighting factor stage 1 is currently known and the learning delivery's applicable programme weighting factor stage 1 is certain
"A"	otherwise

Specialist Resources Uplift

Programme weighting factor "G" attracts an extra uplift if the provider has been flagged as a specialist resource provider.

The uplift value is based on the ratio of 2012/13 programme weighting factors.

the organisational reference data has a valid factor if
> TemporalOnOrAfter(the organisational funding effective from date) and
> either
>> all
>>> the organisational funding's effective to date is currently known and
>>> TemporalOnOrBefore(the organisational funding's effective to date)
>> or
>> the organisational funding's effective to date is currently unknown

the campus funding's applicable effective to date	
the date 1 day after the campus funding's effective to date	the campus funding's effective to date is currently known and the campus funding's effective to date is certain
Latest()	otherwise

the learner's campus specialist resource flags = TemporalFromRange(the campus funding for the learner, the campus funding's effective from date, the campus funding's applicable effective to date, the campus funding's specialist resources)

the learning delivery's applicable campus specialist resource flag = ValueAt(the learning delivery's applicable campus lookup factor date, the learner's campus specialist resource flags)

the learning delivery has specialist resources	
true	the learning delivery's applicable campus specialist resource flag is currently known and the learning delivery's applicable campus specialist resource flag is certain and the learning delivery's applicable campus specialist resource flag = "Y"
false	the learning delivery's applicable campus specialist resource flag is currently known and the learning delivery's applicable campus specialist resource flag is certain and the learning delivery's applicable campus specialist resource flag = "N"
true	for at least one of the organisational funding reference data ValueAt(the learning delivery's applicable lookup factor date, the organisational reference data has a valid factor) and the organisational reference data has a applicable specialist resource uplift
false	otherwise

the organisational reference data has a applicable specialist resource uplift if

the organisational funding's funding factor value is currently known and

the organisational funding's funding factor value starts with "1" and

the organisational funding's funding factor is currently known and

the organisational funding's upper case funding factor = "SPECIALIST RESOURCES"

the learning delivery's specialist resources uplift	
192/172	the learning delivery's applicable programme weighting factor = "G" and the learning delivery has specialist resources
1	**otherwise**

Long Term Residential College Uplift

If the aim is residential, and the provider is a long term residential college, then the funding is uplifted.

the organisational reference data has a applicable LTRC uplift if

the organisational funding's funding factor value is currently known and

the organisational funding's funding factor value starts with "1" and

the organisational funding's funding factor is currently known and

the organisational funding's upper case funding factor = "LONG TERM RESIDENTIAL"

the learning delivery is a long term residential college if

for at least one of the organisational funding reference data

ValueAt(the learning delivery's applicable lookup factor date, the organisational reference data has a valid factor) and

the organisational reference data has a applicable LTRC uplift

the learning delivery's LTRC uplift	
4.7	the learning delivery is a long term residential college and the learning delivery is residential
1	**otherwise**

Funding

46.   This section contains the main funding calculation.

Apprenticeship Age Factor

For Apprenticeship aims which are part of frameworks, apply factors to 16-18 Apprenticeships and 24+ Apprenticeships. These factors are based on the relationship between the 2012/13 National Rates between 16-18, 19-24 and 25+ Apprenticeships.

the learning delivery's Apprenticeship age factor	
0	the learning delivery's funding line type = "None"
the default Apprenticeship age factor	the learning delivery is not an Apprenticeship programme aim and the learning delivery is not an Apprenticeship component aim
the 16-18 Apprenticeship age factor	the learning delivery is EEF 4 and either the learning delivery's funding line type = "19-23 Apprenticeship" or the learning delivery's funding line type = "24+ Apprenticeship"
the default Apprenticeship age factor	the learning delivery's funding line type = "24+ Apprenticeship" and the learning delivery is a higher apprenticeship prescribed HE aim
the 24+ Apprenticeship age factor	the learning delivery's funding line type = "24+ Apprenticeship"
the default Apprenticeship age factor	the learning delivery's funding line type = "19-23 Apprenticeship"
the 16-18 Apprenticeship age factor	the learning delivery's funding line type = "16-18 Apprenticeship"
the default Apprenticeship age factor	otherwise

Functional Skills Adjustment Factor

Apply a reduction to the funding if the aim is a 16-18 Apprenticeship Functional Skill.

The general principle is that learners on existing Apprenticeship Frameworks should have the same rate in 2013/14 as at the end of 2012/13.

Between 2012/13 and 2013/14, the rate for Functional Skills has increased, but at the same time the Government contribution for 19+ Apprenticeship Functional Skills has changed from 82.5% to 50%. The overall effect is that Functional Skills which are co-funded for 19+ learners have the same effective rate as in 2012/13.

However, in order to maintain the 2012/13 rates for fully-funded 16-18 learners, a further factor is applied to 16-18 Apprenticeship Functional Skills, based on the ratio of the Government contributions in 2012/13 and 2013/14.

<table>
<tr><td colspan="2">the learning delivery's 16-18 Apprenticeship Functional Skills adjustment factor</td></tr>
<tr><td>(1 - the national non-government percentage) / (1 - the 2012/2013 functional skills fee proportion)</td><td>the learning delivery is an Apprenticeship Functional Skills aim and
either
    the learning delivery's funding line type = "16-18 Apprenticeship" or
    all
        the learning delivery is EEF 4 and
        either
            the learning delivery's funding line type = "19-23 Apprenticeship" or
            the learning delivery's funding line type = "24+ Apprenticeship"</td></tr>
<tr><td>1</td><td>otherwise</td></tr>
</table>

Large Employer Factor

Apply a reduction to the funding if the provider is a large employer and it is a 19-23 or 24+ Apprenticeship or Workplace learning aim. The logic also applies factors for OLASS, Classroom Learning and 16-18 Apprenticeships, but these parameters are currently set to 1.

Providers who are directly-funded employers have the discount applied to them, regardless of the individual learner's employer. For example, if a provider delivers training to employees of a smaller subcontractor, the discount would still apply.

ATA and GTA aims do not have the large employer reduction applied to them.

the organisational reference data has a applicable directly funded employer uplift if

> the organisational funding's funding factor value is currently known and
>
> the organisational funding's funding factor value starts with "1" and
>
> the organisational funding's funding factor is currently known and
>
> the organisational funding's upper case funding factor = "SFA DIRECTLY FUNDED EMPLOYER"

the learning delivery is a directly funded employer stage one if

> for at least one of the organisational funding reference data
>
>> ValueAt(the learning delivery's applicable employment factor date, the organisational reference data has a valid factor) and
>>
>> the organisational reference data has a applicable directly funded employer uplift

the learning delivery is a directly funded employer if

> it is currently known whether or not the learning delivery is a directly funded employer stage one and
>
> it is certain whether or not the learning delivery is a directly funded employer stage one and
>
> the learning delivery is a directly funded employer stage one

the learning delivery's large employer factor	
the default large employer factor	the learning delivery is not for a large employer and it is currently known whether or not the learning delivery is a directly funded employer and the learning delivery is not a directly funded employer

the default large employer factor	the learning delivery is an ATA or GTA Apprenticeship aim or the learning delivery is a higher apprenticeship prescribed HE aim
the large employer factor for 19-24 Traineeships	the learning delivery's funding line type = "19-24 Traineeship (non-procured)" or the learning delivery's funding line type = "19-24 Traineeship (procured from Nov 2017)"
the large employer factor for 16-18 Apprenticeships	the learning delivery's funding line type = "16-18 Apprenticeship"
the large employer factor for 16-18 Apprenticeships	the learning delivery is EEF 4 and either the learning delivery's funding line type = "19-23 Apprenticeship" or the learning delivery's funding line type = "24+ Apprenticeship"
the large employer factor for 19-23 Apprenticeships	the learning delivery's funding line type = "19-23 Apprenticeship"
the large employer factor for 24+ Apprenticeships	the learning delivery's funding line type = "24+ Apprenticeship"
the large employer factor for Adult OLASS	the learning delivery's funding line type = "Adult OLASS"
the large employer factor for AEB – Other Learning	the learning delivery's funding line type = "ESFA AEB – Adult Skills (non-procured)" or the learning delivery's funding line type = "ESFA AEB – Adult Skills (procured from Nov 2017)"
the default large employer factor	otherwise

Find the date of the latest applicable employment status record.

For Apprenticeship component aims, this is the latest employment status record which has an applicable date on or before the related Apprenticeship programme aim's start date.

For other aims, this is the latest employment status record which has an applicable date on or before the aim's start date.

the learning delivery's large employer employment status date	
the latest of all the employment status's date applies for the Apprenticeship programme aim's applicable employment statuses	the learning delivery is an Apprenticeship component aim
the latest of all the employment status's date applies for the learning delivery's applicable employment statuses	**otherwise**

Get the employer id from that employment status record.

the learning delivery's large employer id	
InstanceValueIf(the Apprenticeship programme aim's applicable employment statuses, the employment status's employer identifier, the employment status's date applies = the learning delivery's large employer employment status date)	the learning delivery is an Apprenticeship component aim
InstanceValueIf(the learning delivery's applicable employment statuses, the employment status's employer identifier, the employment status's date applies = the learning delivery's large employer employment status date)	**otherwise**

Determine whether that employment status record's employer id is for a large employer. There is a workaround to convert the boolean large employer attribute into "Y"/"N" and back again because InstanceValueIf doesn't work with booleans.

the learning delivery is for a large employer	
true	it is currently known whether or not the learning delivery's employer identifier is a large employer and it is certain whether or not the learning delivery's employer identifier is a large employer and the learning delivery's employer identifier is a large employer
false	otherwise

Start Indicator

The aim counts as a start for funding purposes if it has no actual end date, or if it has achieved, or if the actual number of days in learning meets the threshold number of days.

the learning delivery is a start for funding purposes	
false	the learning delivery is a non-funded Apprenticeship aim
true	the learning delivery's learning actual end date is unknown

true	the learning delivery's outcome is currently known and
	
	anythe learning delivery's outcome = 1 or
	
	    the learning delivery's outcome = 6 or
	    the learning delivery's outcome = 7

true	the learning delivery's actual number of days in learning is currently known and thelearning delivery's threshold days is currently known and the learning delivery's actual number of days in learning >= the learning delivery's threshold days
false	otherwise

Base Aim Values

The aim value is the weighted base rate from LARS multiplied by all of the previously calculated adjustment factors.

the learning delivery's aim value	
the learning delivery's applicable weighted rate * the learning delivery's Apprenticeship age factor * the learning delivery's specialist resources uplift * the learning delivery's LTRC uplift * the learning delivery's adjusted area cost factor * the learning delivery's adjusted disadvantage uplift * the learning delivery's large employer factor * the learning delivery's 16-18 Apprenticeship Functional Skills adjustment factor	the learning delivery is a start for funding purposes and the learning delivery's funding line type <> "None"
0	otherwise

This is the unweighted base rate from LARS.

the learning delivery's base unweighted value	
the learning delivery's applicable unweighted rate	the learning delivery is a start for funding purposes and the learning delivery's funding line type <> "None"
0	otherwise

Non-Government Contribution

If the aim is co-funded, and is an Apprenticeship, the non-government contribution is half of the weighted aim value. If the aim is co-funded, and is not an Apprenticeship, the non-government contribution is half of the unweighted aim value.

the learning delivery's non-government contribution	
0	the learning delivery is fully funded
the learning delivery's aim value * the national non-government percentage	the learning delivery is not fully funded and the learning delivery is an Apprenticeship
the learning delivery's base unweighted value * the national non-government percentage	the learning delivery is not fully funded and the learning delivery is not an Apprenticeship
0	**otherwise**

Proportion of Funding Remaining

This is a combination of the funding adjustment for prior learning and the other funding adjustment multiplied together.

This factor is applied to monthly instalments (on-programme and balancing).

the learning delivery's proportion of funding remaining	
the learning delivery's other funding adjustment / 100 * the learning delivery's funding adjustment for prior learning / 100	the learning delivery's other funding adjustment is currently known and the learning delivery's funding adjustment for prior learning is currently known
the learning delivery's other funding adjustment / 100	the learning delivery's other funding adjustment is currently known
the learning delivery's funding adjustment for prior learning / 100	the learning delivery's funding adjustment for prior learning is currently known
1	**otherwise**

In some cases, the funding adjustment factors are also applied to the achievement cash (including job outcome payments).

The other funding adjustment always applies across all cash values.

The adjustment for prior learning applies to the achievement cash if the aim is not a restart.

the learning delivery's proportion of funding remaining for achievement	
the learning delivery's other funding adjustment / 100	the learning delivery is a restart and the learning delivery's other funding adjustment is currently known
the learning delivery's proportion of funding remaining	the learning delivery is not a restart
1	otherwise

Number of Instalments Per Period

The aim always receives a double instalment in the first period and a single instalment in subsequent periods, up to the earlier of the planned end date and actual end date.

From the second period onwards, the aim only receives funding if it reaches the end of that period.

the learning delivery's number of instalments this period	
2	TemporalOnOrAfter(the beginning of the learning delivery's start date period) and TemporalBefore(the date 1 months after the beginning of the learning delivery's start date period)
1	the learning delivery's learning actual end date is currently known and TemporalOnOrAfter(the date 1 months after the beginning of the learning delivery's start date period) and TemporalBefore(the earliest of the beginning of the period the day after the learning delivery's actual end date and the beginning of the period the day after the learning delivery's planned end date)
1	the learning delivery's learning actual end date is unknown and TemporalOnOrAfter(the date 1 months after the beginning of the learning delivery's start date period) and TemporalBefore(the beginning of the period the day after the learning delivery's planned end date)
0	otherwise

Planned, Actual and Outstanding Instalments

This is planned number of instalments for the aim, which is the number of periods between the start date and the planned end date, with two instalments in the first period.

the learning delivery's planned instalments	
0	the learning delivery is not a start for funding purposes
2	the learning delivery's planned end date and start date are in the same period
1 + the number of months from the beginning of the learning delivery's start date period to the beginning of the period the day after the learning delivery's planned end date	otherwise

This is the number of periods between the start date and the earlier of the planned end date and actual end date, with two instalments in the first period.

the learning delivery's actual instalments	
the learning delivery's planned instalments	the learning delivery's learning actual end date is unknown
0	the learning delivery is not a start for funding purposes
2	the learning delivery's planned end date and start date are in the same period or the learning delivery's actual end date and start date are in the same period
1 + the number of months from the beginning of the learning delivery's start date period to the earliest of the beginning of the period the day after the learning delivery's actual end date and the beginning of the period the day after the learning delivery's planned end date	otherwise

This is the difference between the number of planned instalments and the number of actual instalments. This is used to calculate the balancing payment, as detailed elsewhere, if applicable.

the learning delivery's outstanding instalments = the learning delivery's planned instalments - the learning delivery's actual instalments

On-Programme Payments

This is a time-based attribute which is the percentage of the aim value that will be paid as on-programme funding in each period.

It is calculated as 100% minus the amount held back for achievement, multiplied by the proportion of funding remaining, and then divided up among the planned instalments.

For transitional aims continuing from 2012/13, the percentage is calculated in the transitional calculation.

The same percentage value is used to calculate the uncapped on-programme cash, and then the main cash value.

the learning delivery's on-programme percentage	
the learning delivery's transitional on-programme percentage	the learning delivery is transitional
(1 - the default total achievement percentage) * the learning delivery's number of instalments this period / the learning delivery's planned instalments * the learning delivery's proportion of funding remaining	the learning delivery is a start for funding purposes and the date is in the current funding year
0	**otherwise**

The uncapped cash values are used to calculate the cap factor, which in turn is used to calculate the capped cash values.

the learning delivery's uncapped on-programme cash	
the learning delivery's base unweighted value * the learning delivery's on-programme percentage	the learning delivery is a start for funding purposes and the date is in the current funding year
0	**otherwise**

This is the weighted aim value minus the non-government contribution, multiplied by the on-programme percentage calculated above and the cap factor.

the learning delivery's on-programme cash	
(the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's on-programme percentage * the learning delivery's cap factor	the learning delivery is a start for funding purposes and the date is in the current funding year
0	otherwise

Balancing Payment

This is a time-based attribute which is the percentage of the aim value that will be paid as a balancing payment.

For non-transitional learners, it is calculated as 100% minus the amount held back for achievement, multiplied by the proportion of funding remaining, and then divided up among the planned instalments, and the date is assigned to the period of the actual end date.

Balancing payments are only generated if the learning aim has been achieved.

For transitional aims continuing from 2012/13, the percentage, and temporal information on when it applies, are calculated in the transitional calculation.

The same percentage value is used to calculate the uncapped balancing cash, and then the main cash value.

the learning delivery's balancing percentage	
the learning delivery's transitional balancing percentage	the learning delivery is transitional
(1 - the default total achievement percentage) * the learning delivery's outstanding instalments / the learning delivery's planned instalments * the learning delivery's proportion of funding remaining	the learning delivery has been achieved and the learning delivery's planned instalments > 0 and the date is in the learning delivery's actual end date period
0	otherwise

The uncapped cash values are used to calculate the cap factor, which in turn is used to calculate the capped cash values.

the learning delivery's uncapped balancing payment cash = the learning delivery's base unweighted value * the learning delivery's balancing percentage

This is the weighted aim value minus the non-government contribution, multiplied by the balancing percentage calculated above and the cap factor.

the learning delivery's balancing payment cash = (the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's balancing percentage * the learning delivery's cap factor

Eligibility for Aim Achievement Payment

An aim is considered to be achieved if its completion status is 'Completed', its outcome is 'Achieved', and it has an actual end date.

the learning delivery has been achieved if

> the learning delivery's completion status is currently known and
>
> the learning delivery's completion status = 2 and
>
> the learning delivery's outcome is currently known and
>
> any
>
> > the learning delivery's outcome = 1 or
> >
> > the learning delivery's outcome = 6 or
> >
> > the learning delivery's outcome = 7
>
> and
>
> the learning delivery's learning actual end date is currently known

An aim is eligible for an aim achievement payment if it achieves. Apprenticeship Knowledge or Competency aims are a special case because they do not receive their aim achievement payment until the related Apprenticeship programme aim achieves.

The relationship between Apprenticeship aims includes the pathway in this case.

the learning delivery is eligible for an aim achievement payment	
true	the learning delivery is an Apprenticeship Knowledge or Competency aim and the learning delivery has been achieved and the learning delivery's number of Apprenticeship pathway programme aim records > 0 and for at least one of the learning delivery's Apprenticeship pathway programme aims (the programme aim) the programme aim has been achieved
true	the learning delivery is not an Apprenticeship Knowledge or Competency aim and the learning delivery has been achieved
false	otherwise

Applicable Aim Achievement Date

The aim achievement is paid in the period of the aim's actual end date, except for Apprenticeships where the aim achievement is paid in the period of the related Apprenticeship programme aim's actual end date.

the learning delivery's latest Apprenticeship pathway programme aim actual end date = the learning delivery's learning actual end date which is the latest for all of the learning delivery's Apprenticeship pathway programme aims for which it is the case that the learning delivery has been achieved

the learning delivery's applicable aim achievement date	
the learning delivery's latest Apprenticeship pathway programme aim actual end date	the learning delivery is an Apprenticeship Knowledge or Competency aim and the learning delivery is eligible for an aim achievement payment **Knowledge and Competency aims receive their achievement payment on the related programme aim's actual end date.**

the learning delivery's achievement date	the learning delivery is a Traineeship programme aim and the learning delivery is eligible for an aim achievement payment and the learning delivery's adjusted Traineeship programme start date is on or later than the Traineeship Method Transition Date
the learning delivery's learning actual end date	the learning delivery is eligible for an aim achievement payment
uncertain	**otherwise**

the beginning of the learning delivery's aim achievement payment period = MakeDate(ExtractYear(the learning delivery's applicable aim achievement date), ExtractMonth(the learning delivery's applicable aim achievement date), 1)

This is a time-based attribute which is set to True for every day in the period of the aim's applicable achievement date. This is used when assigning the achievement payment.

the date is in the learning delivery's aim achievement payment period	
true	the beginning of the learning delivery's aim achievement payment period is currently known and the beginning of the learning delivery's aim achievement payment period is certain and TemporalOnOrAfter(the beginning of the learning delivery's aim achievement payment period) and TemporalBefore(the date 1 months after the beginning of the learning delivery's aim achievement payment period) and the date is in the current funding year
false	**otherwise**

Aim Achievement Payment

This is a time-based attribute which is the percentage of the aim value that will be paid as an aim achievement payment, if it is eligible. The aim achievement percentage is reduced if the aim also receives a job outcome payment.

For transitional aims continuing from 2012/13, the percentage, and temporal information on when it applies, are calculated in the transitional calculation.

the learning delivery's aim achievement percentage	
the learning delivery's transitional aim achievement percentage	the learning delivery is transitional
(the default total achievement percentage – the default job outcome percentage) * the learning delivery's proportion of funding remaining for achievement	the learning delivery is eligible for an aim achievement payment and the date is in the learning delivery's aim achievement payment period the learning delivery is eligible for a job outcome payment
the default total achievement percentage * the learning delivery's proportion of funding remaining for achievement	the learning delivery is eligible for an aim achievement payment and the date is in the learning delivery's aim achievement payment period and the learning delivery is not eligible for a job outcome payment
0	otherwise

This is the weighted aim value minus the non-government contribution, multiplied by the achievement percentage calculated above and the cap factor.

the learning delivery's aim achievement cash = (the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's aim achievement percentage * the learning delivery's cap factor

This achievement element cash value is not used elsewhere in the calculation, but is produced as an output to aid interpretation of the funding calculation results.

It represents the maximum achievement cash that a learner might generate if they achieve, and stays the same regardless of whether the learner actually achieves the aim or a job outcome.

the learning delivery's achievement element	
(the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's transitional achievement percentage held back * the learning delivery's cap factor	the learning delivery is transitional
(the learning delivery's aim value - the learning delivery's non-government contribution) * the default total achievement percentage * the learning delivery's cap factor * the learning delivery's proportion of funding remaining for achievement	otherwise

Eligibility for Job Outcome Payment

The aim is eligible for a job outcome payment if it is Classroom learning, has an actual end date which is on or after 1 August 2012, and has an employment outcome of 'Employed'.

Programme aims in a Traineeship starting on or after the 1st August 2015 will have their full 20% achievement element generated if they meet the progression criteria which can include getting a job. The 10% job outcome payment is not applied for these aims.

the learning delivery is eligible for a job outcome payment		
false	the learning delivery is a Traineeship programme aim and	
	the learning delivery's adjusted Traineeship programme start date is on or later than the Traineeship method transition date	
true	*the learning delivery is Classroom learning and*	
	the learning delivery is not an Apprenticeship and	
	the learning delivery is not OLASS in custody and	
	the learning delivery's learning actual end date is currently known and	
	the learning delivery's learning actual end date is on or later than 2012-08-01 and	
	the learning delivery's employment outcome is currently known and any	
		the learning delivery's employment outcome = 1 or the learning delivery's employment outcome = 2
false	otherwise	

Job Outcome Payment

This is a time-based attribute which is the percentage of the aim value that will be paid as a job outcome payment, if it is eligible for one.

the learning delivery's job outcome percentage	
the learning delivery's transitional job outcome percentage	the learning delivery is transitional
the default job outcome percentage * the learning delivery's proportion of funding remaining for achievement	the learning delivery is eligible for a job outcome payment and the date is in the learning delivery's actual end date period
0	otherwise

This is the weighted aim value minus the non-government contribution, multiplied by the job outcome percentage calculated above and the cap factor.

the learning delivery's job outcome cash = (the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's job outcome percentage * the learning delivery's cap factor

Cap Factor

A funding cap applies to each learner with the provider for each year, across all Adult Skills Budget provision, except Apprenticeships. The funding cap will be £4,400 per learner per year, before any weightings or government contribution calculations are applied.

Total the uncapped on-programme and balancing funding for the learner. Note that Apprenticeships are excluded from the total, and that achievement funding is not part of the calculation of the cap. However the resultant cap factor is applied to achievement funding if there is any.

The IntervalDailySumIf function converts the time-based on-programme and balancing payments into a single non time-based value, using the values as at the last day of each period.

the learner's total uncapped funding = IntervalDailySumIf(the current funding year start date, the date 1 days after the current funding year end date, ((the learning delivery's uncapped on-programme cash totalled for all of the learner's learning deliveries for which it is the case that the learning delivery is not an Apprenticeship) + (the learning delivery's uncapped balancing payment cash totalled for all of the learner's learning deliveries for which it is the case that the learning delivery is not an Apprenticeship)), the date is the last day of the period)

Because the value of £4,400 is based on full rates, but achievement is not used as part of calculating the cap factor, the limit value is reduced by the achievement percentage. This limit ('yearly cap amount excluding achievement') is 80% of £4,400, which is £3,520.

Cap the learner's funding if it goes over the yearly cap amount (excluding achievement). For example, if the total un-capped funding is twice the yearly cap amount, the cap factor would be 50%.

the learner's cap factor	
the yearly cap amount excluding achievement / the learner's total uncapped funding	the learner's total uncapped funding > the yearly cap amount excluding achievement
1	**otherwise**

Apply the learner's cap factor to all non-Apprenticeship learning deliveries. This is because capping is not applied to Apprenticeships.

the learning delivery's cap factor	
1	the learning delivery is an Apprenticeship
the learner's cap factor	**otherwise**

Learning Support Funding

Determine the Learning Support rate based on the funding line type.

the learning delivery's LSF rate	
150	the learning delivery's funding line type = "Adult OLASS"
150	the learning delivery's funding line type = "ESFA AEB – Adult Skills (non-procured)"
150	the learning delivery's funding line type = "ESFA AEB – Adult Skills (procured from Nov 2017)"
150	the learning delivery's funding line type = "19-24 Traineeship (non-procured)"
150	the learning delivery's funding line type = "19-24 Traineeship (procured from Nov 2017)"
150	the learning delivery's funding line type = "16-18 Apprenticeship"
150	the learning delivery is EEF 4 and either the learning delivery's funding line type = "19-23 Apprenticeship" or the learning delivery's funding line type = "24+ Apprenticeship"
150	the learning delivery's funding line type = "19-23 Apprenticeship"
150	the learning delivery's funding line type = "24+ Apprenticeship"
150	the learning delivery's funding line type = "Adult Education – Eligible for MCA/GLA funding (non-procured)"
150	the learning delivery's funding line type = "Adult Education – Eligible for MCA/GLA funding (procured)"
0	**otherwise**

Aims are only eligible for Learning Support in a period if the start date is in that period, the actual end date (if known) reaches the end of that period, the Learning Delivery FAM's 'from' date is in that period, and the Learning Delivery FAM's 'to' date reaches the end of that period. Also an aim must have a planned (and actual if known) length of at least one calendar month to be eligible for LSF.

the learning delivery is eligible for LSF in the period		
false	the learning delivery is not a start for funding purposes or	
	the learning delivery's learning planned end date is earlier than the date 1 months after the learning delivery's learning start date	
true	the learning delivery's learning actual end date is currently known and	
	the learning delivery's number of FAM records > 0 and	
	for at least one of the learning delivery's FAMs	
		the learning delivery FAM's upper case type = "LSF" and
		the learning delivery FAM's code = "1" and
		TemporalOnOrAfter(the beginning of the learning delivery FAM's from date period)
		TemporalBefore(the beginning of the period the day after the learning delivery FAM's to date)
	and	
	the date is in the current funding year and	
	TemporalOnOrAfter(the beginning of the learning delivery's start date period)	
	TemporalBefore(the beginning of the period the day after the learning delivery's actual end date)	
true	the learning delivery's learning actual end date is unknown and	
	the learning delivery's number of FAM records > 0 and	
	for at least one of the learning delivery's FAMs	
		the learning delivery FAM's upper case type = "LSF" and
		the learning delivery FAM's code = "1" and
		TemporalOnOrAfter(the beginning of the learning delivery FAM's from date period)
		TemporalBefore(the beginning of the period the day after the learning delivery FAM's to date)
	and	
	the date is in the current funding year and	
	TemporalOnOrAfter(the beginning of the learning delivery's start date period)	
false	otherwise	

The next steps are to deal with the cases when two or more aims for the same learner are flagged with Learning Support - the ILR value 'LSF'.

Each learner only generates a maximum of one Learning Support payment per month, even if all their aims are flagged with LSF. Because all funding outputs are at aim level, a priority order is used to work out which aim should be allocated that learner's Learning Support value for that month.

The priority order for choosing which aim is allocated the funding is as follows:

(a)   Look for the highest Learning Support rate that month. An aim which has been flagged with the LSF code will be given higher priority than an aim which wasn't flagged. If two or more aims are flagged then currently they all have the same the same Learning Support rate, but this also future-proofs against scenarios when the rates might vary, in which case the highest rate would takes priority.

(b)   If multiple aims have the same rate, then Apprenticeship Programme aims are higher priority than other aims (because the LSF value should be recorded in ILR against the Programme aims).

(c)   If there are multiple Programme aims, or if the learner is not on an Apprenticeship, find the aim with the earliest start date. This reduces cases when the Learning Support funding generated would moves from one aim to another during the learner's programme.

(d)   If there are multiple aims starting on the same date (with other previous criteria equal) use the aim with the lowest sequence number in the ILR data.

Find the highest LSF rate across all of the aims which are eligible for LSF.

the learner's highest LSF rate = the learning delivery's LSF rate which is the greatest for all of the learner's learning deliveries for which it is the case that the learning delivery is eligible for LSF in the period

Flag the eligible aims which have the highest LSF rate.

the learning delivery's LSF rate is the highest priority if
    the learning delivery is eligible for LSF in the period and
    the learning delivery's LSF rate = the learner's highest LSF rate

Find the LSF aim type priority across all of the aims.

the learning delivery's LSF aim type	
2	the learning delivery is an Apprenticeship programme aim or the learning delivery is a Traineeship programme aim
1	otherwise

Find the highest LSF aim type across all of the eligible aims which have the highest LSF rate.

the learner's highest LSF aim type = the learning delivery's LSF aim type which is the greatest for all of the learner's learning deliveries for which it is the case that the learning delivery's LSF rate is the highest priority

Flag eligible aims which have the highest LSF rate and highest LSF aim type.

the learning delivery's LSF aim type is the highest priority if
  the learning delivery is eligible for LSF in the period and
  the learning delivery's LSF rate is the highest priority and
  the learning delivery's LSF aim type = the learner's highest LSF aim type

Find the earliest start date across all of the eligible aims which have the highest LSF rate and highest LSF aim type.

the learner's earliest LSF start date = the learning delivery's learning start date which is the earliest for all of the learner's learning deliveries for which it is the case that the learning delivery's LSF aim type is the highest priority

Flag eligible aims which have the highest LSF rate, highest LSF aim type and earliest start date.

the learning delivery's LSF start date is the highest priority if
  the learning delivery is eligible for LSF in the period and
  the learning delivery's LSF aim type is the highest priority and
  the learning delivery's learning start date = the learner's earliest LSF start date

Find the lowest aim sequence number among the eligible aims which have the highest LSF rate, highest LSF aim type and earliest start date.

the learner's lowest LSF aim sequence number = the learning delivery's aim sequence number which is the least for all of the learner's learning deliveries for which it is the case that the learning delivery's LSF start date is the highest priority

Pay the LSF to the eligible aim, determined above.

the learning delivery's LSF cash	
the learning delivery's LSF rate	the learning delivery is eligible for LSF in the period and the learning delivery's aim sequence number = the learner's lowest LSF aim sequence number
0	otherwise

Transitional Learners

47.　　This section calculates funding for aims continuing from 2012/13. The general approach is this:

(a)　The funding adjustment for prior learning is used to calculate what proportion of the 2012/13 aim value the learner would have been expected to generate, as at the start date, assuming everything was achieved.

(b)　Then, the calculation determines what proportion of the 2012/13 aim value has been generated up to 31 July 2013, using the 2012/13 earnings methods (including the funding adjustment for prior learning).

(c)　The result of (a) minus (b) is the percentage which is left to be generated from 1 August 2013 onwards. This is called the Transitional Start Proportion. This is applied to the 2014/15 aim value, which in many cases will be the same as the 2012/13 value.

(d)　Calculate the achievement percentage. In 2014/15 this is usually 20% but in some cases it is affected by the funding adjustment factors. Also, if (c) is already less than the default achievement element, all of (c) becomes the achievement percentage.

(e)　If the learner is eligible for a job outcome payment on or after 1 August 2013, then half of (d) is allocated to a job outcome percentage. This is usually 10%, but it may not be if (d) is not 20%.

(f)　What is left after subtracting (d) from (c) is allocated to monthly instalments and apportioned over planned periods from 1 August 2013. If there are no planned periods after 1 August then all of {(c) minus (d)} becomes a balancing percentage in August 2013, as long as the aim is achieved.

(g)　If the learner's actual periods on the aim (from 1 August 2013 onwards) are less than the planned periods (from 1 August 2013 onwards), and they achieve the aim, they generate a balancing percentage in the period of the actual end date, using the normal earnings method as applied to (f).

(h)   If the learner achieves the aim, they generate the achievement percentage in (d) (minus (e) if applicable) in the period of the actual end date. If the actual end date is before 1 August 2013, and the achievement date is on or after 1 August 2013, then achievement is assigned to the August 2013 period. For Knowledge and Competency aims, achievement is only generated when the learner achieves the framework as well as the aim, and the period used is the actual end date of the whole framework, or August 2013 if that actual end date is before 1 August 2013 and the achievement date is after 31 July 2013.

Parameters

This is the date that the funding methodology changed. Aims which start before this date are considered transitional, assuming they meet the other transitional criteria detailed below. Also define the end of the transition period (in practice, the end of August) because aims ending before 31 August are treated as ending in a previous funding year.

the funding method transition date = 2013-08-01

the end of the funding method transition period = the date 1 days before the date 1 months after the funding method transition date

This is the achievement percentage that was used in the 2012/13 funding calculation, as it is different to the 2014/15 achievement percentage.

the default 2012/2013 total achievement percentage = 25%

Funding Model

Determine whether the aim was Employer Responsive Other (old funding model 45) or Adult Learner Responsive (old funding model 22) in 2012/13.

the learning delivery was Employer Responsive Other if

the learning delivery's adjusted start date is earlier than the funding method transition date and

the learning delivery is not an Apprenticeship and

the learning delivery is not OLASS in custody

for at least one of the learning delivery's FAMs

> the learning delivery FAM's upper case type = "LDM" and
>
> either
>
> > the learning delivery FAM's code = "125" or
> >
> > the learning delivery FAM's code = "350"

Add LDM 350 to this rule and take out work place learning

the learning delivery was Adult Learner Responsive if

> the learning delivery's adjusted start date is earlier than the funding method transition date and
>
> the learning delivery is not an Apprenticeship and
>
> the learning delivery is not OLASS in custody and
>
> the learning delivery was not Employer Responsive Other

Transitional Criteria

Determine if the aim might potentially achieve on or after 1 August 2013.

the learning delivery will potentially achieve after transition if

> all
>
> > the learning delivery's achievement date is currently known and
> >
> > the learning delivery's achievement date is on or later than the funding method transition date
>
> or
> all
>
> > the learning delivery's achievement date is unknown and
> >
> > any
> >
> > > the learning delivery's outcome is unknown or
> > >
> > > the learning delivery's outcome = 4 or
> > >
> > > the learning delivery's outcome = 5

Determine if the aim is a transitional Apprenticeship programme aim.

It must start before 1 August 2013, be a start for funding purposes, and not be OLASS. Also it must have an actual end date which is either unknown or on or after 1 August 2013. There is a special case for aims that have an actual end date before the funding method transition date (1 August 2013) but have not yet had an achievement date recorded by then. These will not have generated achievement funding in the 2012/13 funding calculation so exceptionally the 2014/15 funding calculation uses the achievement date field to determine if it needs to generate achievement in 2014/15.

the learning delivery is a transitional Apprenticeship programme aim if	
false	the learning delivery's learning start date is on or later than the funding method transition date or the learning delivery is OLASS in custody or the learning delivery was Adult Learner Responsive or the learning delivery is not a start for funding purposes or the learning delivery is not an Apprenticeship programme aim
true	the learning delivery's learning actual end date is unknown
true	the learning delivery's learning actual end date is on or later than the funding method transition date
true	the learning delivery will potentially achieve after transition
false	otherwise

The aim is transitional if they are still in learning (or waiting for achievement) on 1 August 2013, even though they might get no on-programme funding because they have passed their planned end date.

Apprenticeship Knowledge and Competency component aims are counted as transitional if their related Apprenticeship programme aim is transitional. This is wider than just the Competency aims because Knowledge aims didn't have achievement held back in 2012/13 but if they run through the normal calculation it will try to give them 20% achievement in 2014/15 when the Framework is achieved.

Other aims in Apprenticeships (for example Functional Skills) don't inherit transitional status from the programme aim because they would not generate achievement when the programme aim achieves in either the 2012/13, 2013/14 or 2014/15 calculations.

the learning delivery is transitional	
false	the learning delivery's learning start date is on or later than the funding method transition date or the learning delivery is OLASS in custody or the learning delivery is not a start for funding purposes

true	the learning delivery's learning actual end date is unknown
true	the learning delivery's learning actual end date is on or later than the funding method transition date
true	the learning delivery was not Adult Learner Responsive and the learning delivery will potentially achieve after transition
true	the learning delivery is an Apprenticeship Knowledge or Competency aim and for at least one of the learning delivery's Apprenticeship pathway programme aims (the programme aim) the programme aim is a transitional Apprenticeship programme aim
false	**otherwise**

Pre-Transition Instalments

This is the number of on-programme instalments paid before 1 August 2013, for aims that were funded using funding model 45 in 2012/13.

the learning delivery's pre-transitional actual instalments	

0	the learning delivery is not transitional or
	all
	
	    the learning delivery was not Employer Responsive other and
	
	    the learning delivery is not an Apprenticeship

the learning delivery's actual instalments	the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is earlier than the funding method transition date
2	the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is on or later than the funding method transition date and any the learning delivery's actual end date and start date are in the same period or

		the learning delivery's planned end date and start date are in the same period
1 + the number of months from the beginning of the learning delivery's start date period to the earliest of the funding method transition date and the beginning of the period the day after the learning delivery's planned end date		the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is on or later than the funding method transition date
the learning delivery's planned instalments		the learning delivery's learning actual end date is unknown and the learning delivery's learning planned end date is earlier than the funding method transition date
2		the learning delivery's learning actual end date is unknown and the learning delivery's learning planned end date is on or later than the funding method transition date and the learning delivery's planned end date and start date are in the same period
1 + the number of months from the beginning of the learning delivery's start date period to the funding method transition date		the learning delivery's learning actual end date is unknown and the learning delivery's learning planned end date is on or later than the funding method transition date
0	otherwise	

This is the number of on-programme instalments which would have been paid as a balancing payment before 1 August 2013.

the learning delivery's pre-transitional balancing instalments	
the learning delivery's planned instalments - the learning delivery's actual instalments	the learning delivery is transitional and the learning delivery's achievement date is currently known and the learning delivery's achievement date is earlier than the funding method transition date
0	otherwise

This is the planned number of days before 1 August 2013.

the learning delivery's pre-transitional planned number of days = (the number of days from the learning delivery's learning start date to the earliest of the date 1 days before the funding method transition date and the learning delivery's learning planned end date) + 1

Pre-Transition Achievement Percentage

This is the percentage of achievement held back from the aim before 1 August 2013. Only applicable to aims funded through Funding Model 45 in 2012/13, and within Apprenticeships, only Competency aims.

There are both "scaled" and "unscaled" values depending on the proportion of funding remaining for achievement; both values are required later.

the learning delivery's pre-transitional achievement percentage held back unscaled		
the default 2012/2013 total achievement percentage	the learning delivery is transitional and any	
		the learning delivery was Employer Responsive Other or the learning delivery is an Apprenticeship Competency aim
0	otherwise	

the learning delivery's pre-transitional proportion of funding remaining for achievement	
the learning delivery's other funding adjustment / 100	the learning delivery's other funding adjustment is currently known
1	otherwise

the learning delivery's pre-transitional achievement percentage held back = the learning delivery's pre-transitional achievement percentage held back unscaled * the learning delivery's pre-transitional proportion of funding remaining for achievement

Pre-Transition On-Programme Percentage

This is the percentage of on-programme and balancing funding received before 1 August 2013.

the learning delivery's pre-transitional on-programme percentage	
0	the learning delivery is not transitional
(the learning delivery's pre-transitional actual instalments + the learning delivery's pre-transitional balancing instalments) / the learning delivery's planned instalments * the learning delivery's proportion of funding remaining * (1 - the learning delivery's pre-transitional achievement percentage held back unscaled)	the learning delivery was Employer Responsive Other or the learning delivery is an Apprenticeship
the learning delivery's pre-transitional planned number of days / the learning delivery's planned number of days in learning * the learning delivery's proportion of funding remaining	the learning delivery was Adult Learner Responsive
0	otherwise

Pre-Transition Job Outcome Percentage

This is the job outcome percentage that the aim received in 2012/13.

the learning delivery's pre-transitional job outcome percentage	

the default job outcome percentage * the learning delivery's pre-transitional proportion of funding remaining for achievement	the learning delivery is transitional and
	
	the learning delivery was Employer Responsive Other and
	
	the learning delivery is Classroom learning and
	
	the learning delivery is not an Apprenticeship and
	
	the learning delivery's learning actual end date is currently known and
	
	the learning delivery's learning actual end date is on or later than 2012-08-01 and
	
	the learning delivery's learning actual end date is earlier than the funding method transition date and
	
	the learning delivery's employment outcome is currently known and
	
	any
	
	    the learning delivery's employment outcome = 1 or
	    the learning delivery's employment outcome = 2

0	**otherwise**

Transitional Start Proportion

This is one of the main results in the transitional calculation. It represents the total percentage of the aim rate (on-programme, balancing and achievement) which is left at 1 August 2013, and is used as the baseline amount from which 2014/15 funding is apportioned.

The principle is to take the percentage which the aim would have been expected to generate as at the start, and subtract what has been generated before 1 August 2013.

This is the achievement held back before 1 August 2013 (minus any job outcome already earned), plus the maximum potential on-programme and balancing at start, minus the amount of on-programme (including balancing) received before 1 August 2013.

the learning delivery's transitional start proportion	
the learning delivery's pre-transitional achievement percentage held back - the learning delivery's pre-transitional job outcome percentage + (the learning delivery's proportion of funding remaining * (1 - the learning delivery's pre-transitional achievement percentage held back unscaled)) - the learning delivery's pre-transitional on-programme percentage	the learning delivery is transitional
0	**otherwise**

Transitional Achievement Percentage

This is the percentage of achievement (aim achievement plus job outcome) held back from 1 August 2013.

This uses the 2014/15 achievement percentage, adjusted for the proportion of funding remaining and job outcomes already generated before 1 August, unless the total amount left as at 1 August 2013 (transitional start proportion) is less than the normal achievement value.

the learning delivery's transitional achievement percentage held back	
0	the learning delivery is not transitional
the learning delivery's transitional start proportion	((the default total achievement percentage * the learning delivery's proportion of funding remaining for achievement) - the learning delivery's pre-transitional job outcome percentage) > the learning delivery's transitional start proportion
(the default total achievement percentage * the learning delivery's proportion of funding remaining for achievement) - the learning delivery's pre-transitional job outcome percentage	otherwise

Transitional Instalments

This is the number of planned on-programme instalments from 1 August 2013. The aim receives a double instalment in August 2013 if the aim (planned end date) reaches the end of August, and if the extra instalments parameter is set, and then a single instalment in subsequent periods if the aim reaches the end of that period. Any aim that wasn't planned to reach the end of August has already had all of its on-programme (possibly not balancing) instalments in 2012/13.

the learning delivery's transitional planned instalments	
0	the learning delivery is not transitional
1	the learning delivery's learning planned end date = the end of the funding method transition period
(the number of months from the funding method transition date to the beginning of the period the day after the learning delivery's planned end date)	the learning delivery's learning planned end date is later than the end of the funding method transition period
0	otherwise

This is the number of actual on-programme instalments from 1 August 2013. It is calculated in the same way as the attribute above, except for using the earliest of the aim's planned and actual end dates, if the actual end date is known, or just the planned end date if not.

the learning delivery's transitional actual instalments	
0	the learning delivery is not transitional
the learning delivery's transitional planned instalments	the learning delivery's learning actual end date is unknown
1	the earliest of the learning delivery's learning planned end date and the learning delivery's learning actual end date = the end of the funding method transition period
(the number of months from the funding method transition date to the earliest of the beginning of the period the day after the learning delivery's actual end date and the beginning of the period the day after the learning delivery's planned end date)	the earliest of the learning delivery's learning planned end date and the learning delivery's learning actual end date is later than the end of the funding method transition period
0	otherwise

This is the number of outstanding on-programme instalments which will be included in the balancing payment.

the learning delivery's transitional outstanding instalments = the learning delivery's transitional planned instalments - the learning delivery's transitional actual instalments

This is the number of on-programme instalments per period, from 1 August 2013. This is a time-based attribute with each period in the current funding year having a value of 0 or 1 (or 2 if the extra instalments parameter is set). The aim receives a double instalment in August 2013 if the aim (planned end date) reaches the end of August, and if the extra instalments parameter is set, and then a single instalment in subsequent periods if the aim reaches the end of that period.

	the learning delivery's transitional number of instalments this period
0	the learning delivery is not transitional
1	the learning delivery's learning actual end date is currently known and TemporalOnOrAfter(the funding method transition date) and TemporalBefore(the earliest of the beginning of the period the day after the learning delivery's actual end date and the beginning of the period the day after the learning delivery's planned end date) and the earliest of the learning delivery's learning planned end date and the learning delivery's learning actual end date is on or later than the end of the funding method transition period
1	the learning delivery's learning actual end date is unknown and TemporalOnOrAfter(the funding method transition date) and TemporalBefore(the beginning of the period the day after the learning delivery's planned end date) and the learning delivery's learning planned end date is on or later than the end of the funding method transition period
0	**otherwise**

Transitional On-Programme Percentage

This is the percentage of the aim value that is paid as on-programme payments. This is a time-based attribute which only has values in the periods in which the aim receives on-programme payments (because the variable 'the learning delivery's transitional number of instalments this period' is time-based).

the learning delivery's transitional on-programme percentage	
(the learning delivery's transitional start proportion - the learning delivery's transitional achievement percentage held back) * the learning delivery's transitional number of instalments this period / the learning delivery's transitional planned instalments	the learning delivery is a start for funding purposes and the learning delivery is transitional and the learning delivery's transitional planned instalments > 0 and the date is in the current funding year
0	**otherwise**

Transitional Balancing Percentage

This is the date on which the balancing payment is paid, that is, the aim's actual end date.

the learning delivery's transitional balancing payment date	
the learning delivery's learning actual end date	the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is on or later than the funding method transition date
the funding method transition date	the learning delivery's learning actual end date is currently known
uncertain	**otherwise**

the beginning of the learning delivery's transitional balancing payment period = MakeDate(ExtractYear(the learning delivery's transitional balancing payment date), ExtractMonth(the learning delivery's transitional balancing payment date), 1)

This is a time-based attribute which is only set to True in the period in which the balancing payment is to be paid.

the date is in the learning delivery's transitional balancing payment period	
true	the beginning of the learning delivery's transitional balancing payment period is currently known and
	the beginning of the learning delivery's transitional balancing payment period is certain and
	TemporalOnOrAfter(the beginning of the learning delivery's transitional balancing payment period) and
	TemporalBefore(the date 1 months after the beginning of the learning delivery's transitional balancing payment period) and
	the date is in the current funding year
false	otherwise

This is the percentage of the aim value that is to be paid as a balancing payment.

If there are any planned instalments in 2013/14, it will be the outstanding number of monthly instalments using the standard value for instalments after 1 August.

If there are no planned instalments in 2013/14, it will be the remaining funding left after subtracting achievement from the transitional start proportion.

The effect is to include the 5% achievement due to the difference in achievement percentage between 2012/13 and 2013/14 in the balancing payment if there are no on-programme payments in 2013/14.

This is a time-based attribute which only has a value in the period in which the balancing payment is to be paid.

the learning delivery's transitional balancing percentage	
0	the learning delivery is not transitional or
	the learning delivery has not been achieved or
	the learning delivery's transitional balancing payment date is unknown or
	the learning delivery's transitional balancing payment date is uncertain

the learning delivery's transitional start proportion - the learning delivery's transitional achievement percentage held back	the learning delivery's transitional start proportion - the learning delivery's transitional achievement percentage held back > 0 and the learning delivery's transitional planned instalments = 0 and the date is in the learning delivery's transitional balancing payment period
(the learning delivery's transitional start proportion - the learning delivery's transitional achievement percentage held back) * the learning delivery's transitional outstanding instalments / the learning delivery's transitional planned instalments	the learning delivery's transitional planned instalments > 0 and the date is in the learning delivery's transitional balancing payment period
0	**otherwise**

Transitional Job Outcome Percentage

This is the percentage of the aim value that is held back for a job outcome payment.

the learning delivery's transitional job outcome percentage held back	
0	the learning delivery is not transitional or the learning delivery is not eligible for a job outcome payment or the learning delivery's learning actual end date is earlier than the funding method transition date
the learning delivery's transitional achievement percentage held back / 2	(the learning delivery's transitional achievement percentage held back) / 2 < (the default job outcome percentage * the learning delivery's proportion of funding remaining for achievement)
the default job outcome percentage * the learning delivery's proportion of funding remaining for achievement	otherwise

This is the above percentage converted into a time-based attribute which only has a value in the period in which the job outcome payment is to be paid, that is, the aim's actual end date.

the learning delivery's transitional job outcome percentage	
the learning delivery's transitional job outcome percentage held back	the date is in the learning delivery's actual end date period
0	otherwise

Transitional Aim Achievement Percentage

This is the date on which the aim achievement payment is to be paid.

the learning delivery's transitional aim achievement payment date	
uncertain	the learning delivery is not eligible for an aim achievement payment
the learning delivery's latest Apprenticeship pathway programme aim actual end date	the learning delivery is an Apprenticeship Knowledge or Competency aim and the learning delivery's latest Apprenticeship pathway programme aim actual end date is currently known and the learning delivery's latest Apprenticeship pathway programme aim actual end date is certain and the learning delivery's latest Apprenticeship pathway programme aim actual end date is on or later than the funding method transition date
the funding method transition date	the learning delivery is an Apprenticeship Knowledge or Competency aim
the learning delivery's learning actual end date	the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is on or later than the funding method transition date
the funding method transition date	the learning delivery's learning actual end date is currently known
uncertain	otherwise

the beginning of the learning delivery's transitional aim achievement payment period = MakeDate(ExtractYear(the learning delivery's transitional aim achievement payment date), ExtractMonth(the learning delivery's transitional aim achievement payment date), 1)

This is a time-based attribute which is only set to True in the period in which the aim achievement payment is to be paid.

the date is in the learning delivery's transitional aim achievement payment period	
true	the learning delivery's transitional aim achievement payment date is currently known and
	the learning delivery's transitional aim achievement payment date is certain and
	TemporalOnOrAfter(the beginning of the learning delivery's transitional aim achievement payment period) and
	TemporalBefore(the date 1 months after the beginning of the learning delivery's transitional aim achievement payment period) and
	the date is in the current funding year
false	otherwise

This is the percentage of the aim value that is held back for an aim achievement payment. The aim achievement payment is reduced if the aim also has a job outcome payment. This is a time-based attribute which only has a value in the period in which the aim achievement payment is to be paid.

the learning delivery's transitional aim achievement percentage	
0	the learning delivery is not transitional or
	the learning delivery is not eligible for an aim achievement payment or
	the learning delivery's transitional aim achievement payment date is unknown or
	the learning delivery's transitional aim achievement payment date is uncertain

(the learning delivery's transitional achievement percentage held back - the learning delivery's transitional job outcome percentage held back)	the date is in the learning delivery's transitional aim achievement payment period and the learning delivery is eligible for a job outcome payment
the learning delivery's transitional achievement percentage held back	the date is in the learning delivery's transitional aim achievement payment period and the learning delivery is not eligible for a job outcome payment
0	**otherwise**

Entity Relationships

48.   This section defines some inferred relationships between entities such as learning aims. For example it relates programme aims to the whole set of aims for that learner's Apprenticeship.

This relationship is used to find matching Traineeship programme aims for the Traineeship component aim. This is used to work out the start date and adjusted start date of the component aim's related programme aim.

the learning delivery (the Traineeship programme aim) is a member of the learning delivery's Traineeship programme aims if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the Traineeship programme aim (the other learner)

one learner is the other learner

the Traineeship programme aim is a Traineeship programme aim and

the Traineeship programme aim's programme type = the learning delivery's programme type

This relationship is used to find matching Apprenticeship programme aims for the Apprenticeship component aim - not using the Apprenticeship pathway. This is used to work out the start date and adjusted start date of the component aim's related programme aim.

the learning delivery (the Apprenticeship programme aim) is a member of the learning delivery's Apprenticeship programme aims if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the Apprenticeship programme aim (the other learner)

one learner is the other learner

the Apprenticeship programme aim is an Apprenticeship programme aim and

the Apprenticeship programme aim's framework code is currently known and

the learning delivery's framework code is currently known and

the learning delivery's programme type is currently known and

the Apprenticeship programme aim's framework code = the learning delivery's framework code and

the Apprenticeship programme aim's programme type = the learning delivery's programme type

This relationship is used to find matching Apprenticeship programme aims for the Apprenticeship component aim - using the Apprenticeship pathway. This is used during the achievement calculation, as certain Apprenticeship component aims are not counted as achieved unless their related Apprenticeship programme aim achieves.

the learning delivery (the Apprenticeship programme aim) is a member of the learning delivery's Apprenticeship pathway programme aims if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the Apprenticeship programme aim (the other learner)

one learner is the other learner

the Apprenticeship programme aim is an Apprenticeship programme aim and

the Apprenticeship programme aim's framework code is currently known and

the Apprenticeship programme aim's Apprenticeship pathway is currently known and

the learning delivery's framework code is currently known and

the learning delivery's Apprenticeship pathway is currently known and

the learning delivery's programme type is currently known and

the Apprenticeship programme aim's framework code = the learning delivery's framework code and

the Apprenticeship programme aim's Apprenticeship pathway = the learning delivery's Apprenticeship pathway and

the Apprenticeship programme aim's programme type = the learning delivery's programme type

These relationships are used to find the learner employment status records which are applicable to the learning delivery and the learning delivery's related Apprenticeship programme aim. They are used during the large employer factor calculation to find the appropriate employer id.

the learner employment status is a member of the learning delivery's applicable employment statuses if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the learner employment status (the other learner)

one learner is the other learner and

the employment status's date applies <= the learning delivery's learning start date and

the employment status's employer identifier is currently known

the learner employment status is a member of the Apprenticeship programme aim's applicable employment statuses if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the learner employment status (the other learner)

one learner is the other learner and

the employment status's date applies <= the learning delivery's Apprenticeship programme start date

the employment status's employer identifier is currently known

the learner employment status is a member of the Apprenticeship programme aim's latest applicable employment statuses if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the learner employment status (the other learner)

one learner is the other learner and

the employment status's date applies = the latest of all the employment status's date applies for the Apprenticeship programme aim's applicable employment statuses and

the employment status's employer identifier is currently known

Versions

the current version of the rulebase = "1920.03.06"

Interface Fields

49.   This section lists inputs to, and outputs from the OPA Rulebase.

Inputs

50.   Learning Delivery records, and associated records, are passed into the rulebase if Funding Model=35, and:

- the Learner does not fail any ILR Validation Rules which are marked as Errors (for the Online systems) or
- the Learner does not fail any ILR Validation Rules marked as SFA Funding Rules (for the offline/FIS system).

Entity	type	public-name	base
	text	LARSVersion	the LARS reference data version
	text	OrgVersion	the Org reference data version
	text	PostcodeDisadvantageVersion	the postcode disadvantage reference data version
	text	UKPRN	UK provider reference number
	date	OrgFundEffectiveFrom	the organisational funding effective from date
	date	OrgFundEffectiveTo	the organisational funding's effective to date
	text	OrgFundFactor	the organisational funding's funding factor
	text	OrgFundFactValue	the organisational funding's funding factor value
	text	OrgFundFactType	the organisational funding's funding factor type
	text	LearnRefNumber	the learner's learner reference number
	date	DateOfBirth	the learner's date of birth
Learner	date	DisUpEffectiveFrom	the learner postcode disadvantage uplift reference data's effective from

Entity	type	public-name	base
Learner	date	DisUpEffectiveTo	the learner postcode disadvantage uplift reference data's effective to date
Learner	number	DisUplift	the learner postcode disadvantage uplift reference data's Uplift
Learner	date	EffectiveFrom	the campus funding's effective from date
Learner	date	EffectiveTo	the campus funding's effective to date
Learner	text	SpecialistResources	the campus funding's specialist resources
Learner	number	EmpId	the employment status's employer identifier
Learner	date	DateEmpStatApp	the employment status's date applies
LearnerEmploymentStatus	date	LargeEmpEffectiveFrom	the learner employment status large employer reference data's effective from date
LearnerEmploymentStatus	date	LargeEmpEffectiveTo	the learner employment status large employer reference data's effective to date
Learner	number	AimSeqNumber	the learning delivery's aim sequence number
Learner	number	AimType	the learning delivery's aim type
Learner	number	ProgType	the learning delivery's programme type
Learner	date	LearnStartDate	the learning delivery's learning start date
Learner	date	OrigLearnStartDate	the learning delivery's original learning start date
Learner	date	LearnPlanEndDate	the learning delivery's learning planned end date
Learner	date	LearnActEndDate	the learning delivery's learning actual end date
Learner	date	AchDate	the learning delivery's achievement date
Learner	number	CompStatus	the learning delivery's completion status

Entity	type	public-name	base
Learner	number	Outcome	the learning delivery's outcome
Learner	number	EmpOutcome	the learning delivery's employment outcome
Learner	number	FworkCode	the learning delivery's framework code
Learner	number	FrameworkCommonComponent	the learning delivery's framework common component
Learner	number	FrameworkComponentType	the learning delivery's framework component type
Learner	number	PwayCode	the learning delivery's Apprenticeship pathway
Learner	number	PriorLearnFundAdj	the learning delivery's funding adjustment for prior learning
Learner	number	OtherFundAdj	the learning delivery's other funding adjustment
Learner	number	AddHours	the learning delivery's additional ESOL hours
Learner	number	EnglPrscID	the learning delivery's England prescribed id
Learner	text	EnglandFEHEStatus	the learning delivery's England FE HE status
LearningDelivery	text	LearnDelFAMType	the learning delivery FAM's type
LearningDelivery	text	LearnDelFAMCode	the learning delivery FAM's code
LearningDelivery	date	LearnDelFAMDateFrom	the learning delivery FAM's date applies from
LearningDelivery	date	LearnDelFAMDateTo	the learning delivery FAM's date applies to
LearningDelivery	number	LearnDelCatRef	the learning delivery LARS category's reference
LearningDelivery	date	LearnDelCatDateFrom	the learning delivery LARS category's effective from date
LearningDelivery	date	LearnDelCatDateTo	the learning delivery LARS category's effective to date
LearningDelivery	number	LearnDelAnnValBasicSkillsTypeCode	the learning delivery annual value's basic skills type code
LearningDelivery	date	LearnDelAnnValDateFrom	the learning delivery annual value's effective from date
LearningDelivery	date	LearnDelAnnValDateTo	the learning delivery annual value's effective to date
LearningDelivery	text	LARSFundCategory	the learning delivery's LARS funding category

Entity	type	public-name	base
LearningDelivery	date	LARSFundEffectiveFrom	the learning delivery's LARS funding effective from date
LearningDelivery	date	LARSFundEffectiveTo	the learning delivery's LARS funding effective to date
LearningDelivery	currency	LARSFundUnweightedRate	the learning delivery's LARS funding unweighted rate
LearningDelivery	currency	LARSFundWeightedRate	the learning delivery's LARS funding weighted rate
LearningDelivery	text	LARSFundWeightingFactor	the learning delivery's LARS funding weighting factor
LearningDelivery	number	AreaCosFactor	the learning delivery postcode area cost reference data's area cost factor
LearningDelivery	date	AreaCosEffectiveFrom	the learning delivery postcode area cost reference data's effective from date
LearningDelivery	date	AreaCosEffectiveTo	the learning delivery postcode area cost reference data's effective to date

Outputs

Entity	type	public-name	base
	text	UKPRN	UK provider reference number
	text	CurFundYr	the current funding year
	text	LARSVersion	the LARS reference data version
	text	OrgVersion	the Org reference data version
	text	PostcodeDisadvantageVersion	the postcode disadvantage reference data version
	text	RulebaseVersion	the current version of the rulebase
	text	LearnRefNumber	the learner's learner reference number
Learner	number	AimSeqNumber	the learning delivery's aim sequence number
Learner	date	AchApplicDate	the learning delivery's applicable aim achievement date
Learner	boolean	Achieved	the learning delivery has been achieved
Learner	currency	AchieveElement	the learning delivery's achievement element
Learner	boolean	AchievePayElig	the learning delivery is eligible for an aim achievement payment
Learner	currency	AchievePayment	the learning delivery's aim achievement cash
Learner	number	AchievePayPct	the learning delivery's aim achievement percentage
Learner	number	AchievePayPctPreTrans	the learning delivery's pre-transitional achievement percentage held back
Learner	number	AchievePayPctTrans	the learning delivery's transitional aim achievement percentage
Learner	number	AchPayTransHeldBack	the learning delivery's transitional achievement percentage held back
Learner	number	ActualDaysIL	the learning delivery's actual number of days in learning
Learner	number	ActualNumInstalm	the learning delivery's actual instalments
Learner	number	ActualNumInstalmPreTrans	the learning delivery's pre-transitional actual instalments

Entity	type	public-name	base
Learner	number	ActualNumInstalmTrans	the learning delivery's transitional actual instalments
Learner	date	AdjLearnStartDate	the learning delivery's adjusted start date
Learner	boolean	AdltLearnResp	the learning delivery was Adult Learner Responsive
Learner	number	AgeAimStart	the learning delivery's age at start
Learner	currency	AimValue	the learning delivery's aim value
Learner	date	AppAdjLearnStartDate	the learning delivery's adjusted Apprenticeship programme start date
Learner	number	AppAgeFact	the learning delivery's Apprenticeship age factor
Learner	boolean	AppATAGTA	the learning delivery is an ATA or GTA Apprenticeship aim
Learner	boolean	AppCompetency	the learning delivery is an Apprenticeship Competency aim
Learner	boolean	AppFuncSkill	the learning delivery is an Apprenticeship Functional Skills aim
Learner	number	AppFuncSkill1618AdjFact	the learning delivery's 16-18 Apprenticeship Functional Skills adjustment factor
Learner	boolean	AppKnowl	the learning delivery is an Apprenticeship Knowledge aim
Learner	date	AppLearnStartDate	the learning delivery's Apprenticeship programme start date
Learner	date	ApplicEmpFactDate	the learning delivery's applicable employment factor date
Learner	date	ApplicFactDate	the learning delivery's applicable lookup factor date
Learner	date	ApplicFundRateDate	the learning delivery's applicable rate date
Learner	text	ApplicProgWeightFact	the learning delivery's applicable programme weighting factor
Learner	currency	ApplicUnweightFundRate	the learning delivery's applicable unweighted rate
Learner	currency	ApplicWeightFundRate	the learning delivery's applicable weighted rate
Learner	boolean	AppNonFund	the learning delivery is a non-funded Apprenticeship aim
Learner	number	AreaCostFactAdj	the learning delivery's adjusted area cost factor

Entity	type	public-name	base
Learner	currency	BalancePayment	the learning delivery's balancing payment cash
Learner	currency	BalancePaymentUncapped	the learning delivery's uncapped balancing payment cash
Learner	number	BalancePct	the learning delivery's balancing percentage
Learner	number	BalancePctTrans	the learning delivery's transitional balancing percentage
Learner	number	BalInstalmPreTrans	the learning delivery's pre-transitional balancing instalments
Learner	currency	BaseValueUnweight	the learning delivery's base unweighted value
Learner	number	CapFactor	the learning delivery's cap factor
Learner	number	DisUpFactAdj	the learning delivery's adjusted disadvantage uplift
Learner	currency	EmpOutcomePay	the learning delivery's job outcome cash
Learner	boolean	EmpOutcomePayElig	the learning delivery is eligible for a job outcome payment
Learner	number	EmpOutcomePct	the learning delivery's job outcome percentage
Learner	number	EmpOutcomePctHeldBackTrans	the learning delivery's transitional job outcome percentage held back
Learner	number	EmpOutcomePctPreTrans	the learning delivery's pre-transitional job outcome percentage
Learner	number	EmpOutcomePctTrans	the learning delivery's transitional job outcome percentage
Learner	boolean	EmpRespOth	the learning delivery was Employer Responsive Other
Learner	boolean	ESOL	the learning delivery is an ESOL aim
Learner	boolean	FullyFund	the learning delivery is fully funded
Learner	text	FundLine	the learning delivery's funding line type
Learner	boolean	FundStart	the learning delivery is a start for funding purposes
Learner	number	InstPerPeriod	the learning delivery's number of instalments this period
Learner	number	LargeEmployerID	the learning delivery's large employer id
Learner	number	LargeEmployerFM35Fctr	the learning delivery's large employer factor

Entity	type	public-name	base
Learner	date	LargeEmployerStatusDate	the learning delivery's large employer employment status date
Learner	text	LearnDelFundOrgCode	the learning delivery's funding organisation code
Learner	boolean	LearnSuppFund	the learning delivery is eligible for LSF in the period
Learner	currency	LearnSuppFundCash	the learning delivery's LSF cash
Learner	number	LTRCUpliftFctr	the learning delivery's LTRC uplift
Learner	currency	NonGovCont	the learning delivery's non-government contribution
Learner	boolean	OLASSCustody	the learning delivery is OLASS in custody
Learner	currency	OnProgPayment	the learning delivery's on-programme cash
Learner	currency	OnProgPaymentUncapped	the learning delivery's uncapped on-programme cash
Learner	number	OnProgPayPct	the learning delivery's on-programme percentage
Learner	number	OnProgPayPctPreTrans	the learning delivery's pre-transitional on-programme percentage
Learner	number	OnProgPayPctTrans	the learning delivery's transitional on-programme percentage
Learner	number	OutstndNumOnProgInstalm	the learning delivery's outstanding instalments
Learner	number	OutstndNumOnProgInstalmTrans	the learning delivery's transitional outstanding instalments
Learner	number	PlannedNumOnProgInstalm	the learning delivery's planned instalments
Learner	number	PlannedNumOnProgInstalmTrans	the learning delivery's transitional planned instalments
Learner	number	PlannedTotalDaysIL	the learning delivery's planned number of days in learning
Learner	number	PlannedTotalDaysILPreTrans	the learning delivery's pre-transitional planned number of days
Learner	number	PropFundRemain	the learning delivery's proportion of funding remaining
Learner	number	PropFundRemainAch	the learning delivery's proportion of funding remaining for achievement
Learner	boolean	PrscHEAim	the learning delivery is a higher apprenticeship prescribed HE aim
Learner	boolean	Residential	the learning delivery is residential

Entity	type	public-name	base
Learner	boolean	Restart	the learning delivery is a restart
Learner	number	SpecResUplift	the learning delivery's specialist resources uplift
Learner	number	StartPropTrans	the learning delivery's transitional start proportion
Learner	number	ThresholdDays	the learning delivery's threshold days
Learner	boolean	Traineeship	the learning delivery is a Traineeship
Learner	boolean	Trans	the learning delivery is transitional
Learner	number	TransInstPerPeriod	the learning delivery's transitional number of instalments this period
Learner	date	TrnAdjLearnStartDate	the learning delivery's adjusted Traineeship programme start date
Learner	boolean	TrnWorkPlaceAim	the learning delivery is a Traineeship work placement aim
Learner	boolean	TrnWorkPrepAim	the learning delivery is a Traineeship work preparation aim
Learner	currency	UnWeightedRateFromESOL	the learning delivery's applicable unweighted rate from ESOL Hours
Learner	currency	UnweightedRateFromLARS	the learning delivery's applicable unweighted rate from LARS
Learner	currency	WeightedRateFromESOL	the learning delivery's applicable weighted rate from ESOL Hours
Learner	currency	WeightedRateFromLARS	the learning delivery's applicable weighted rate from LARS

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